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ABSTRACT

Prepared for use by the Information Technology and Education (ITE) Programme of the Economic and Social Science Research Council (ESRC), this draft document is based on the 1984 EUDISED (European Documentation and Information System for Education) Thesaurus for Information Processing. This draft is a modified thesaurus which aims to keep as close as possible to the "standard" work while allowing for new developments in information technology that have emerged in research and practice over the past few years. The descriptors that are used to represent keywords and concepts in this area are presented in diagrams, or terminographs, one of three forms of presentation used in the EUDISED Thesaurus. Introductory materials provide an example and explanation of terminographs--i.e., clusters of descriptors related to a specific topic displayed hierarchically and showing the relationships between the descriptors; guidance for the selection of descriptors for classifying and indexing documents for effective retrieval by searchers; some guidelines for formulating search queries; notes on the terminographs presented in this draft together with a list of modifications made to the EUDISED terminographs; an index to the terminographs; and the 37 terminographs included in this draft. A brief description of the ESRC Programme and a brief list of ESRC papers relating to information technology and education close this paper. (DJR)

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Occasional Paper
ITE/6/86

A THESAURUS FOR INFORMATION TECHNOLOGY AND EDUCATION

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FOREWORD

This is a draft document prepared for use by the ESRC-ITE Programme (see inside rear cover for an outline). It is based on the 1984 EUDISED Thesaurus for Information Processing. The aim in the first draft has been to make the minimum number of changes to the EUDISED document. This has resulted in compromise and this draft does not claim to represent a formal solution to the way of including terms for the new information technologies in the thesaurus. However, it does aim to be an effective short-term working document and the Programme looks forward to receiving comments and suggestions for change. The Programme also hopes to be able to contribute to the revision of the Eudised thesaurus by its originators.

ACKNOWLEDGEMENTS

The 1984 EUDISED Thesaurus was compiled and published by the Council of Europe and the Commission of the European Communities. It is with their knowledge and permission that this modified version is being distributed by the ESRC-ITE Programme. Their agreement to this form of reproduction is greatly appreciated. It must be stressed that the copyright of the substantive portion of this paper is held jointly by those bodies and the usual copyright laws with respect of commercial exploitation must be observed.

The original planning for the analysis of the problem facing the ITE Programme and a comparable problem facing the Council for Educational Technology in the UK was undertaken jointly. Full acknowledgement of the CET contribution is appropriate here.

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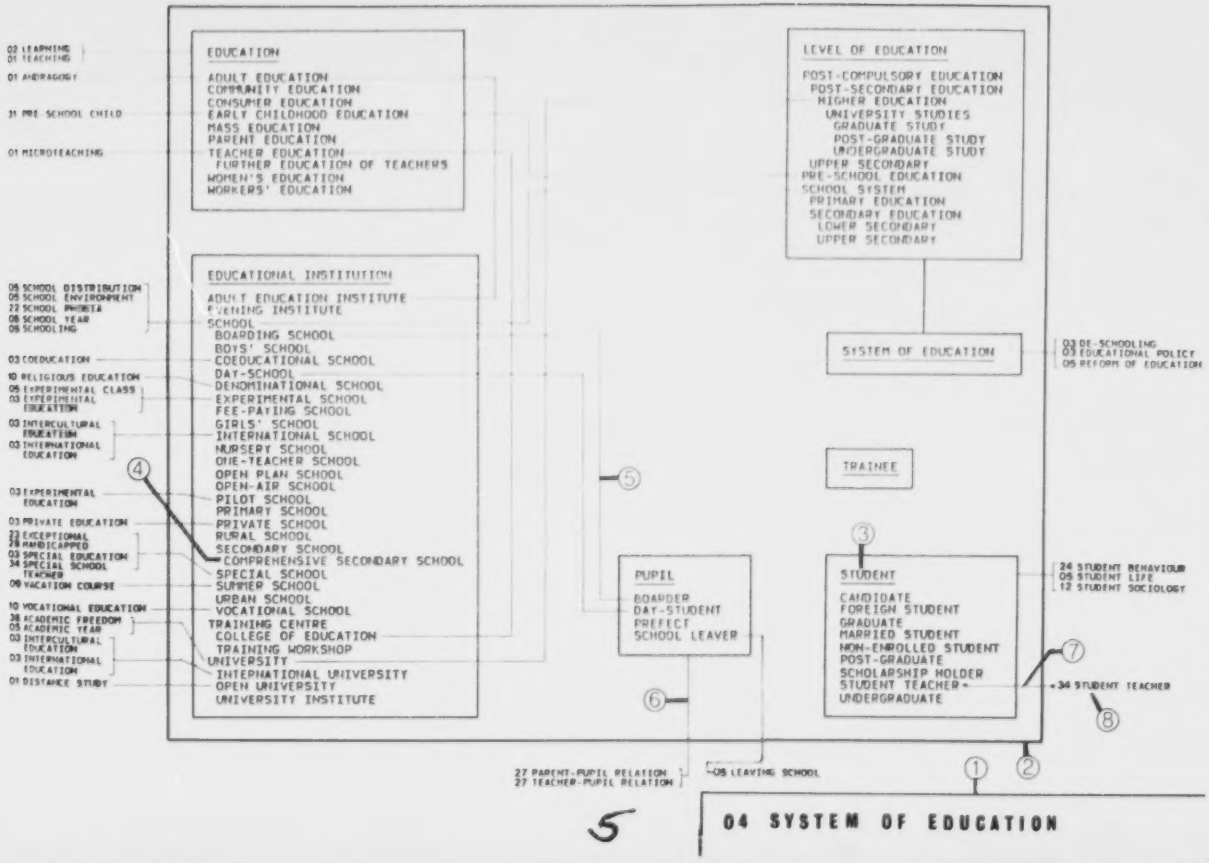
INTRODUCTION

Access to information on specific topics is a key feature of research in all fields. Increasingly, the sources of information are most effectively made available on computer databases. Specialists in information science, including librarians, differ in their approach to searching procedures. There seems to have been a move away from keyword identification to free form precis analysis. Nonetheless, for the general enquirer, a keyword search may be more effective. Assuming this to be the case, many information services provide the option of keyword searching as an alternative to precis analysis.

If keywords are to be used, it seems helpful if suppliers of information and those undertaking searching use a defined set of keywords. These need to be exhaustive and discriminatory, not an easy dichotomy to reconcile. A common thesaurus of terms should also be accepted by all major suppliers and users of databases.

Bearing these points in mind the ESRC-ITE Programme has adopted the EUDISED thesaurus as a basic standard for its work. However, on analysing the 1984 edition of the 'Multilingual Thesaurus for Information Processing in the Field of Education' (ISBN 3-11-009847 - 4) it was found that information technology and its applications in education were not adequately covered. Hence, a modified thesaurus has been compiled which aims to keep as close to the 'standard' work as possible whilst allowing for new activities which have emerged in research and practice over the last few years. In time this modified thesaurus will, hopefully, become overtaken in a more professional way by an authorative version.

The next few pages, based on the EUDISED Thesaurus, provide advice on the way keywords should be selected in order to provide for effective future searching. These are intended for information scientists, librarians and so on for use in classifying documents but should assist us in effective choices to describe interests and experience in the field. The EUDISED thesaurus is presented in three different ways but only one is used in this document. It is the briefest and is the most visual. Comments on this selection will be welcomed.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EUDISED TERMINOGRAPHS

One way of presenting the EUDISED Thesaurus is through the use of terminographs. An example is shown opposite. Each of the 42 microthesauri is represented by a terminograph set out on a single page which is:

- identified in the bottom right corner by a two-digit serial number identical in all language versions, followed by the title of the microthesaurus in the version in question **(1)**;

- listed according to microthesaurus serial number.

Each terminograph contains an innerframe **(2)** containing all the descriptors in the microthesaurus. These descriptors are listed hierarchically under a top term (underlined) inside boxes **(3)**.

Hierarchical relations between descriptors in the same microthesaurus are shown by offsetting specific descriptors to the right of the generic descriptors **(4)**.

Relations of association between descriptors in the same microthesaurus are shown by **(5)** :
- thick lines for relations between top terms;
- medium lines for relations between a top term and another descriptor;
- thin lines for relations between descriptors that are not top terms.

Outside the frame **(2)** appear descriptors referring to other microthesauri, but linked to the descriptors within the microthesaurus by some relation of association (shown by a line without an arrow) **(6)** or by a polyhierarchial relation (shown by a line with a double arrowed line) **(7)**. On the left of each of these external descriptors appear(s) the number(s) of the microthesaurus to which it belongs **(8)**.

The non-descriptors are not marked on the terminographs. [In simple terms, a non-descriptor is an equivalent term for which a descriptor should be used.]

In compiling this modified thesaurus, and bearing in mind the non-specialist nature of its users, it has been decided to use this diagrammatic form of the thesaurus. The alternatives were the Structured Alphabetic Presentation and the Rotated Alphabetical Presentation both of which appeared too formidable to us as amateurs!

The following text is taken from the EUDISED thesaurus.

GUIDANCE ON THE SELECTION OF DESCRIPTORS

"Indexing is the operation whereby the concepts dealt with in a document are identified and represented by descriptors in the thesaurus.

Its purpose is to make it possible to extract from all the bibliographical material either on index cards or on computer those which will give answers to the questions put; such extraction is possible only if the concepts in the question are formulated in the same language - that of the thesaurus descriptors.

The selection of concepts to be represented is based on two rules:

- **selectivity** : only those concepts for which the document supplies information likely to interest users must be selected;

- **exhaustiveness** : all useful concepts contained in the text, whether explicit or implicit, must be selected.

Representation of the concepts thus selected, by means of thesaurus descriptors, entails applying two other rules;

- **vertical specificity**: the descriptor must be on the same level of specificity as the concept or, failing this, on the level immediately above it in the thesaurus;

- **horizontal specificity** : a concept consisting of two or more words must be expressed by means of a composite descriptor, if there is one, rather than by a combination of single descriptors.

In concrete terms, representation of concepts by descriptors proceeds as follows:

- if the document is in a foreign language, the concepts are translated into the language version of the thesaurus used by the indexer;

- "entries" corresponding to the concepts expressed in the document are looked for in the rotated alpha-betical presentation of the thesaurus. There are three possibilities:

  . expression of the concept corresponds to a descriptor signifying it : this is entered on the indexing form;
  . expression of the concept corresponds to a non-descriptor signifying it : the latter refers to the descriptor to be used; then proceed as above;
  . there is no entry corresponding to the expression of the concept. Two methods may then be used:
    * either think of another formulation of the concept in natural language and see whether it corresponds to an entry in the thesaurus;
    * or define the general class or classes (micro-thesaurus) covering the recalcitrant concept, consult the terminographs and look among available descriptors for those which best represent the concept.

Correct application of the rules of selectivity, exhaustiveness and specificity is essential to the quality of a documentary information storage and retrieval system.

- **Selectivity of indexing** :
  . is independent of the quality of the thesaurus;
  . depends on the indexing policy applied for each documentary system;
  . depends on the indexing documentalist's knowledge of the users and their needs.

- **Exhaustiveness is conditioned** :
  . by the wealth of content of the thesaurus; obviously only those concepts which are present in the documentary language can be indexed;
  . by indexing policy, which establishes depth of indexing: it is not possible to determine this depth in advance; there is an optimum which depends on the nature of the questions and which can only be determined iteratively;
  . by the behaviour of the documentalists (in the absence of a specific indexing policy) and their meticulousness.

An increase in the indexing exhaustiveness influences information retrieval in two ways :
- it yields an improvement in response ie the percentage of relevant documents extracted from the thesaurus in reply to a question;
- it causes a drop in precision, ie the proportion of truly relevant documents extracted in reply to a question.

If all concepts, even very subsidiary ones, present in the documents are indexed, the chances of retrieving all or almost all the relevant documents in reply to the questions put are increased, but at the same time the bibliographies obtained will contain a high percentage of documents which are of little or no relevance.

- **Specificity of indexing** also depends on :
  . the thesaurus, which may or may not include a large number of specific descriptors;
  . the indexing policy;
  . the documentalists.

Unlike increased exhaustiveness, an increase in specificity yields:
- a drop in the number of documents retrieved;
- an improvement in precision.

If documents are indexed by means of descriptors having the same level of specifity as the concepts which they contain, questions concerning these descriptors will produce a bibliography that will not include those documents which are indexed at a more generic level, some of which in fact will contain relevant information; by way of compensation, however, the list will include few irrelevant documents. It should be noted that documents indexed at the more generic level may be retrieved precisely through a search among these descriptors.

The reverse is unfortunately not the case. If indexing is not specific we shall have :
- better retrieval;
- poorer precision.

For that reason, it is important to be specific when indexing documents.

FORMUATION OF QUERIES

The formulation of a question and indexing are symmetrical operations: indexing consisted of identifying the concepts dealt with in a document on which information likely to be of interest to users was given. Formulation of a question consists of identifying the descriptors which may have served to translate the concepts characterising information that satisfied a demand and subsequently extracting the indexed documents by means of the descriptors.

Identification of the concepts in a question calls for a very different approach from that used in identifying the concepts in a document : the indexing of a document is an operation that leads to a high degree of compression - a document of 5 to 10 pages is generally represented by 5 to 15 descriptors (ie a compression rate of between 1% and 1 per mil) while the formulation of a question usually leads to expansion of the initial wording.

The first stage in the formulation of a question is to make explicit in as much detail as possible the user's information requirement, expressed in natural language - the documentalist identifies the concepts which together comprise the wording of the user's question.

The documentalist must then represent these concepts by means of the thesaurus descriptors. Three cases should be distinguished :

- the user's question is precise and the concepts contained in it are present in the thesaurus ; the documentalist will preferably make use of the complete structured alphabetical list in which he will find :
  . the descriptors or non-descriptors (and thence other descriptors) corresponding to the wording of the concepts in the questions;
  . descriptors in hierarchial relations and relations of association which may help him to broaden the question;
- not all or none of the concepts contained in the question appear in the thesaurus ; after looking for them in vain in the structured alphabetical list or in the rotated alphabetical list, the documentalist will explore the terminographs corresponding to the field(s) covered by the question put and look in them for existing descriptors designating concepts nearest to those in the question;
- the user's question is imprecise, as is frequently the case: the documentalist will preferably use terminographs, exploring the one(s) which correspond(s) to the user's field(s) of interest : there he will find an ordered collection of descriptors covering the field(s) in question and he will be able to choose the most suitable descriptors.

NOTES ON THE TERMINOGRAPHS

In the 1984 EUDISED thesaurus there are 42 terminographs. The last five of these are specifically related to countries and their geographic characteristics and did not seem necessary in this publication. A number of the others are of only marginal value to users of this thesaurus but are included for completeness.

The aim has been to disrupt the EUDISED thesaurus as little as possible. A completely new terminograph (ØØ NEW EDUCATIONAL TECHNOLOGIES) has been added. On other pages a number of new descriptors and links have been added. These are clearly shown by the distinctive font. They are listed opposite.

The section below lists a set of commonly met terms which are defined as non-descriptors with their preferred descriptors. Only one serious problem has arisen: that is over the use of DATA BANK. It seems that in common parlance the term **DATABASE** should be used (**NB One word**). The problem is overcome, perhaps in searching by using DATABA and DATA BA! Whilst individual suppliers of information to the ESRC research activities database may believe that other descriptors describe their work in a better way, these 'unofficial' descriptors will not be known to searchers. For the time being, ie until a more definitive thesaurus is produced, it will be helpful to use those 'official' descriptors in the thesaurus which are closest to those desired.

PREFERRED TERMS ADOPTED

NON-DESCRIPTOR		DESCRIPTOR
Computer-based Learning	USE	ØØ Computer-Assisted Learning
Computer-based Training		Ø1 Computer-Assisted Training
Distance Learning		Ø1 Distance Study
Heuristic Learning		Ø2 Discovery Learning
Open Learning		Ø3 Open Education
Computer Literacy Inf.Tech.Literacy		1Ø Technological Literacy
Cognitive Psychology		12 Learning Psychology
Screen Design		15 Graphical Design
Student model		16 Learner Model
Concept Hierarchy		16 Concept Analysis
Electronic Planners		17 Spreadsheets
Data Bank		17 Database
Compact Disk		18 Videodisk

The descriptors above are of two kinds:
(a) those already in the 1984 EUDISED Thesaurus (not underlined)
(b) those which have been introduced (underlined)

MODIFICATIONS TO THE EUDISED TERMINOGRAPHS

Term.	Additional descriptors	Added link descriptors
Ø1	Computer-managed Training	ØØ New Educational Technologies
	~~Computer-assisted learning~~	ØØ Software
	Computer program	ØØ IT Applications
	Electronic blackboard	ØØ Computer-assisted Learning
Ø2	Computer-managed Learning	16 Learner Model
	Programming	
Ø3	Numeracy	1Ø Basic Education
		ØØ IT Applications
Ø5	Formative Evaluation	16 Research Techniques
	Summative Evaluation	
Ø6	Graded Test	
	Student Profile	
Ø7		ØØ Hardware
Ø8		ØØ Hardware
Ø9		16 Research
1Ø	Technological Literacy	Ø3 Numeracy
	Computer Education	
11	Information Technology	ØØ Electronic Control
	Artificial Intelligence	ØØ New Educational Technologies
13		17 Electronic Mail
		ØØ Expert system
		ØØ Peripherals
		ØØ Sound Generation
		ØØ Speech Synthesis
15	Graphical Design	
16	Learner Model	2Ø Cognitive Process
	Illuminative Evaluation	Ø2 Learning Strategy
		Ø2 Learning Process
		Ø5 Formative Evaluation
		Ø5 Summative Evaluation
17	Electronic Mail	ØØ New Educational Technologies
	Teleconferencing	18 Reference Material
	Telesoftware	
	Teletext	
	Viewdata	
	Word Processing	
	Spreadsheet	
	Graphical	
	Computer-aided Design	
	Database ----- to replace Data Bank	
18		17 Database
2Ø		16 Learner Model

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35 Administration
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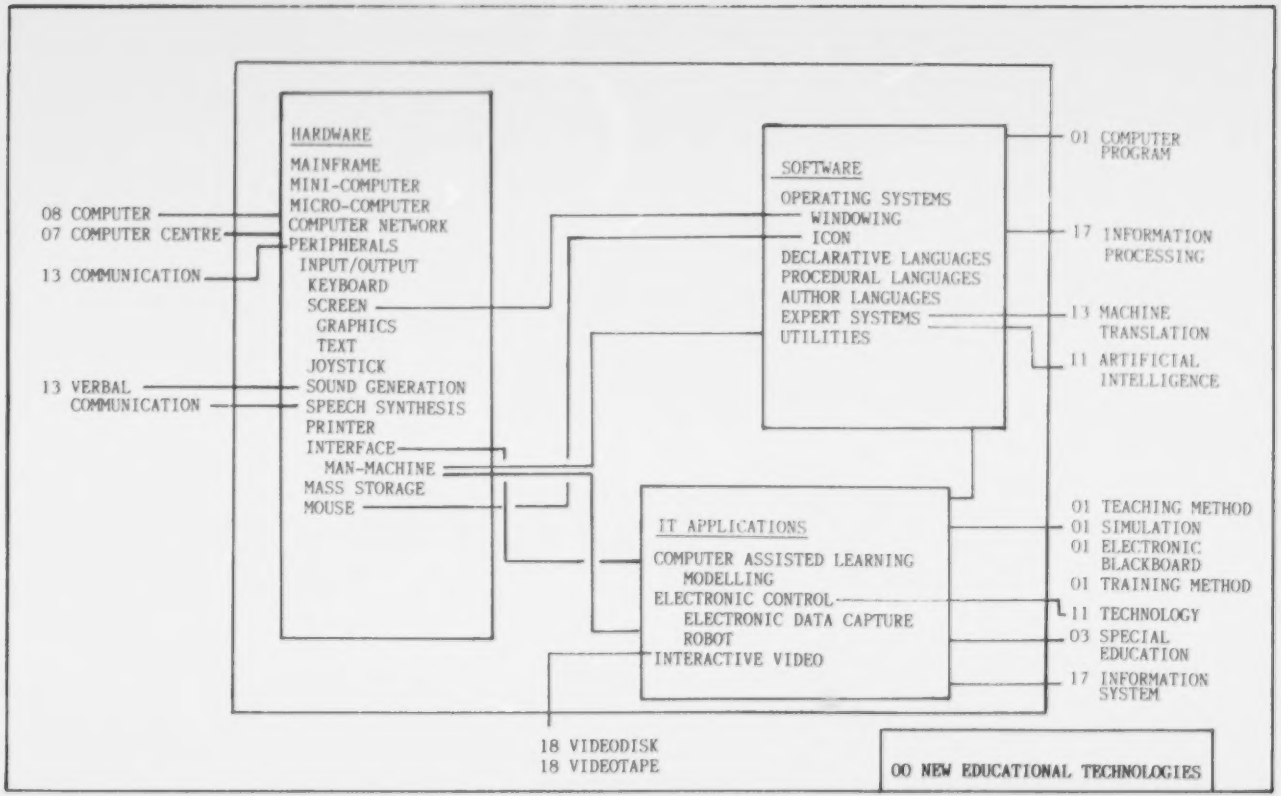
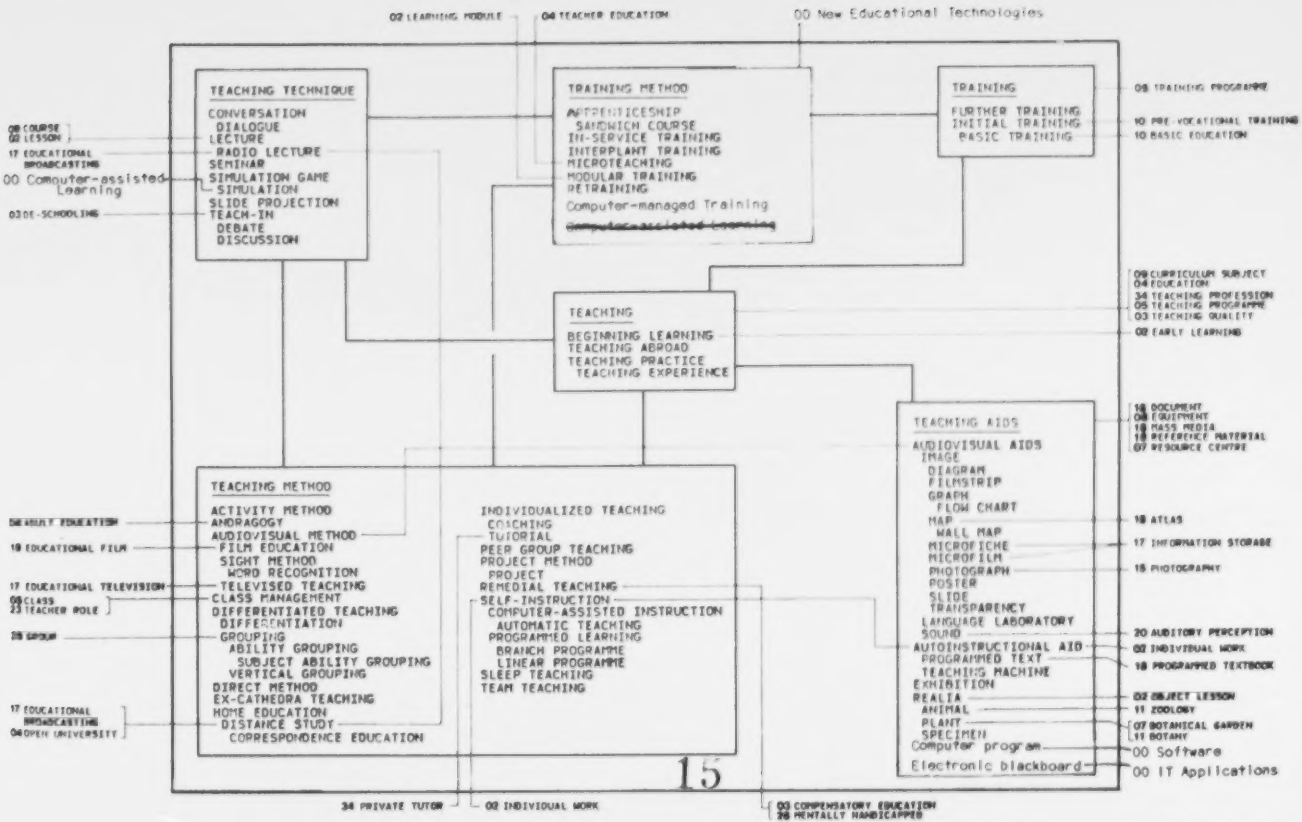
37 International Organisations

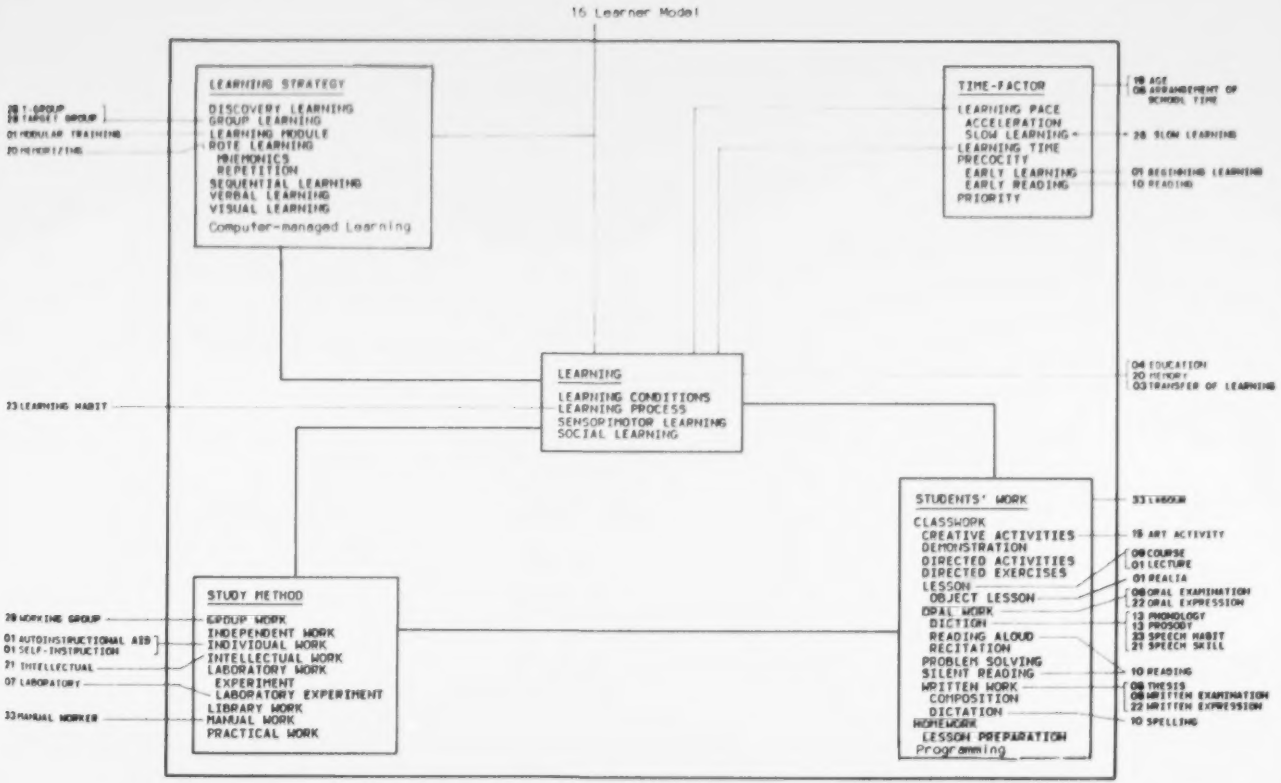
Not included:-
38 Africa
39 America
40 Asia/Middle East/Oceania
41 Europe
42 Regions



NOTE: Names of specific programming languages, e.g. LOGO, PROLOG, may be used



01 TEACHING AND TRAINING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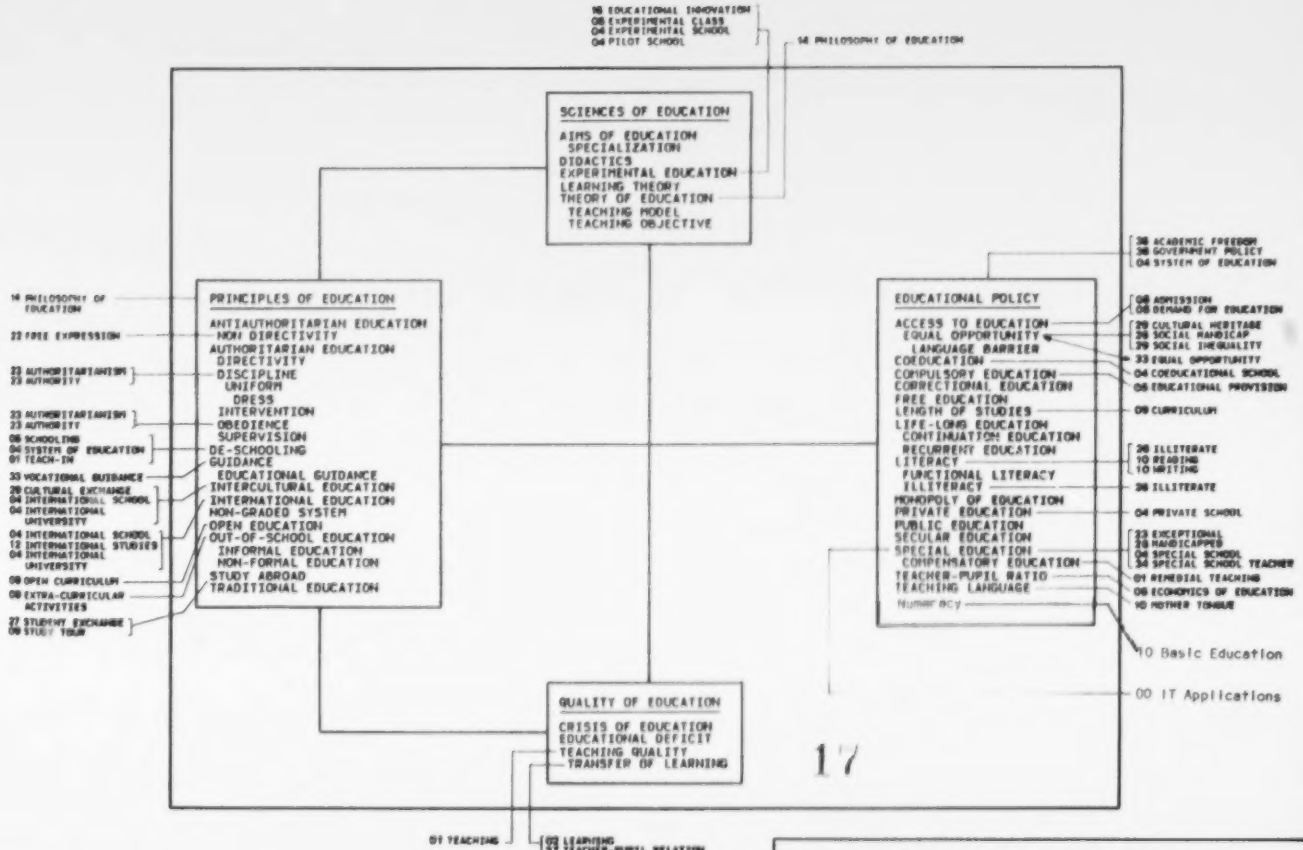
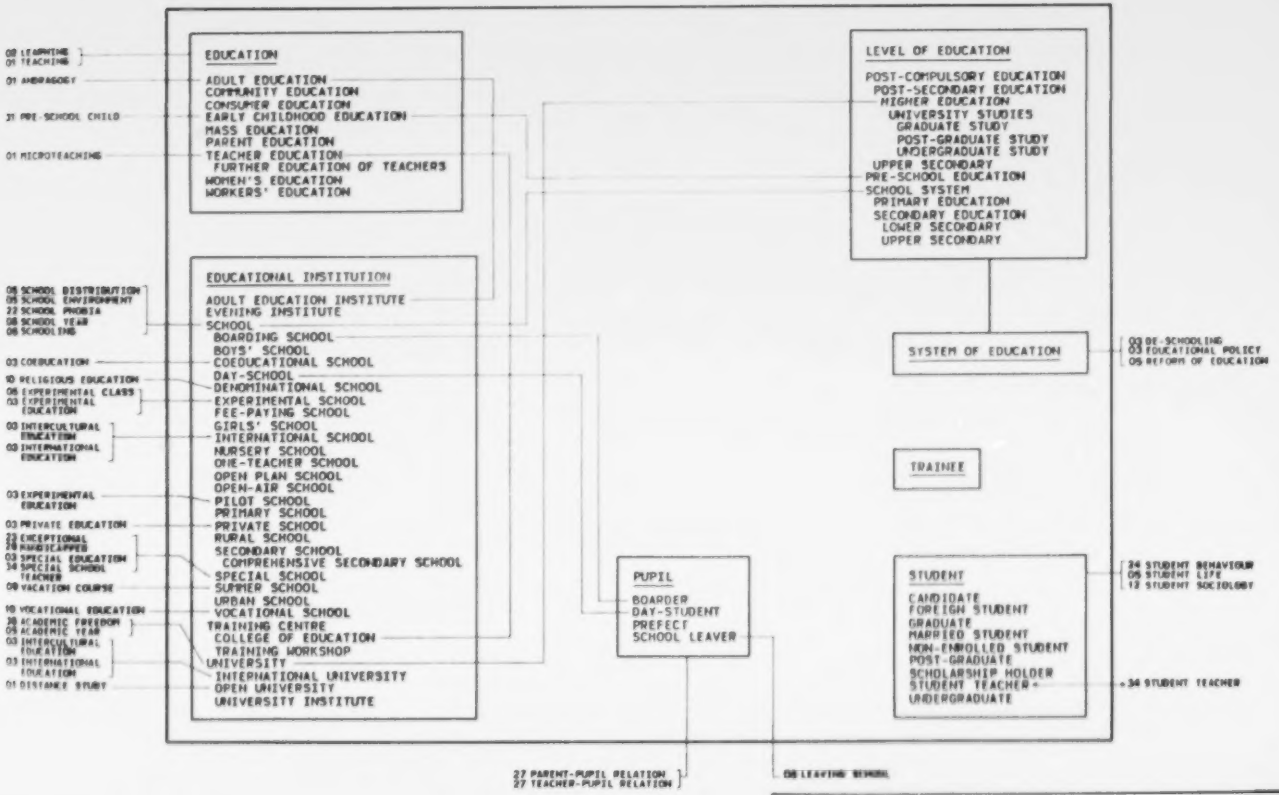
LESSON PREPARATION
Programming



03 PRINCIPLES OF EDUCATION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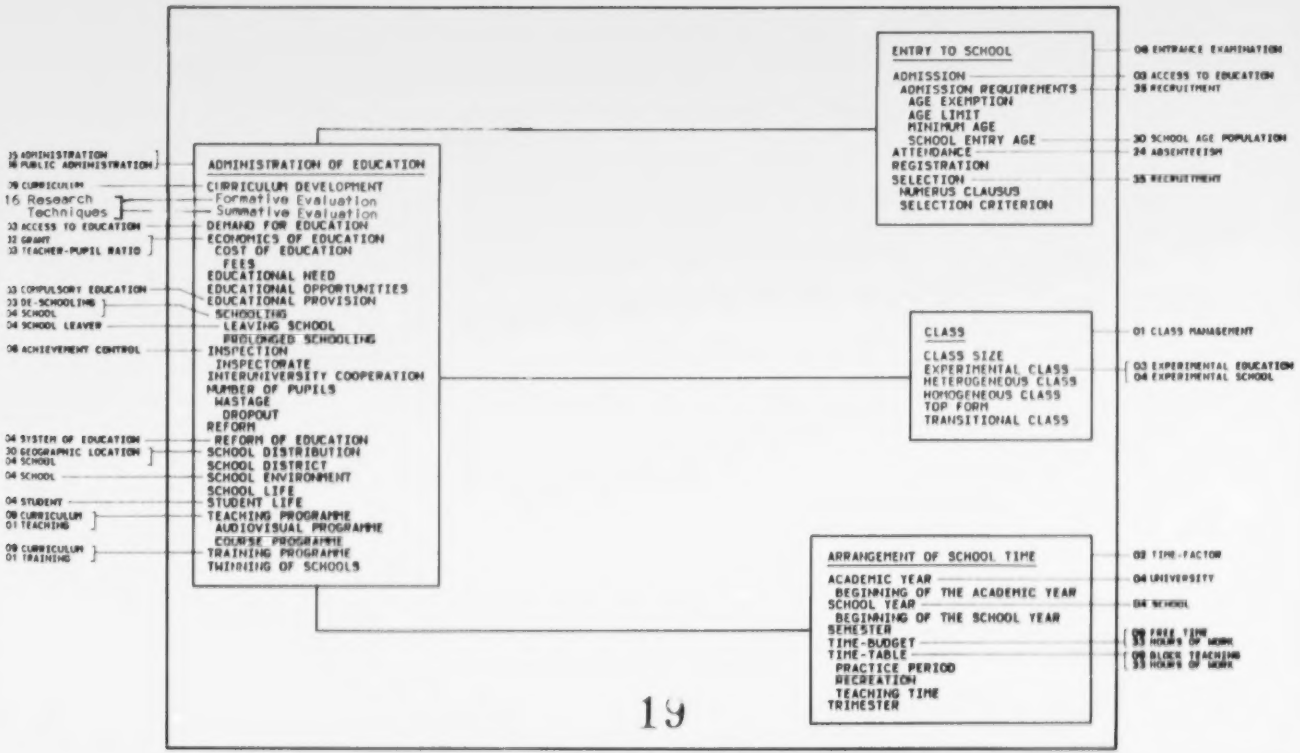

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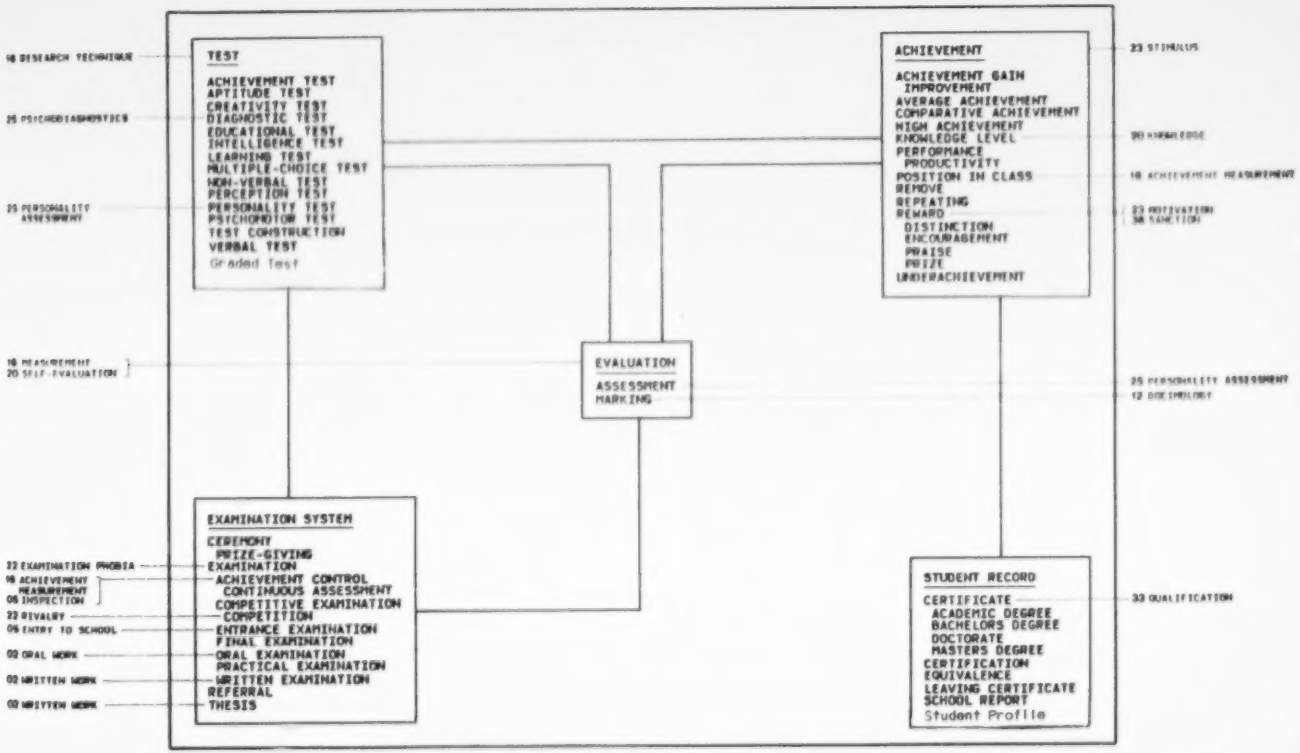
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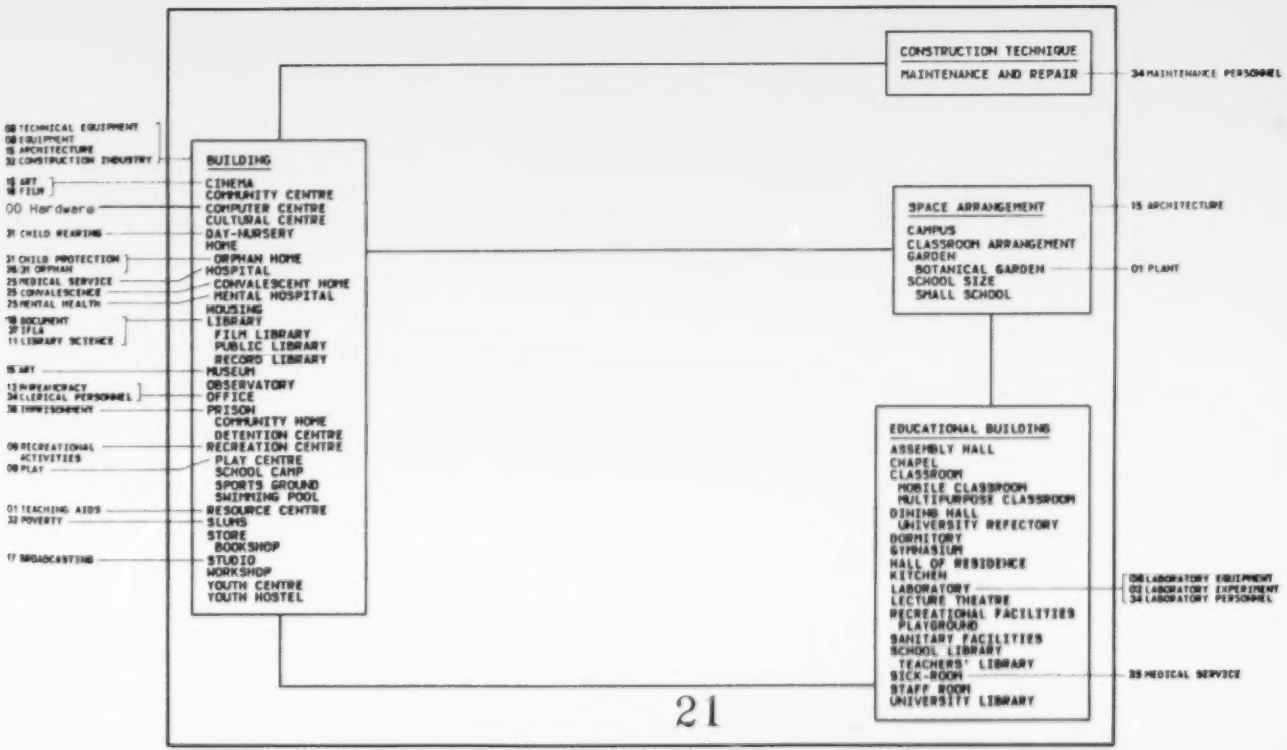
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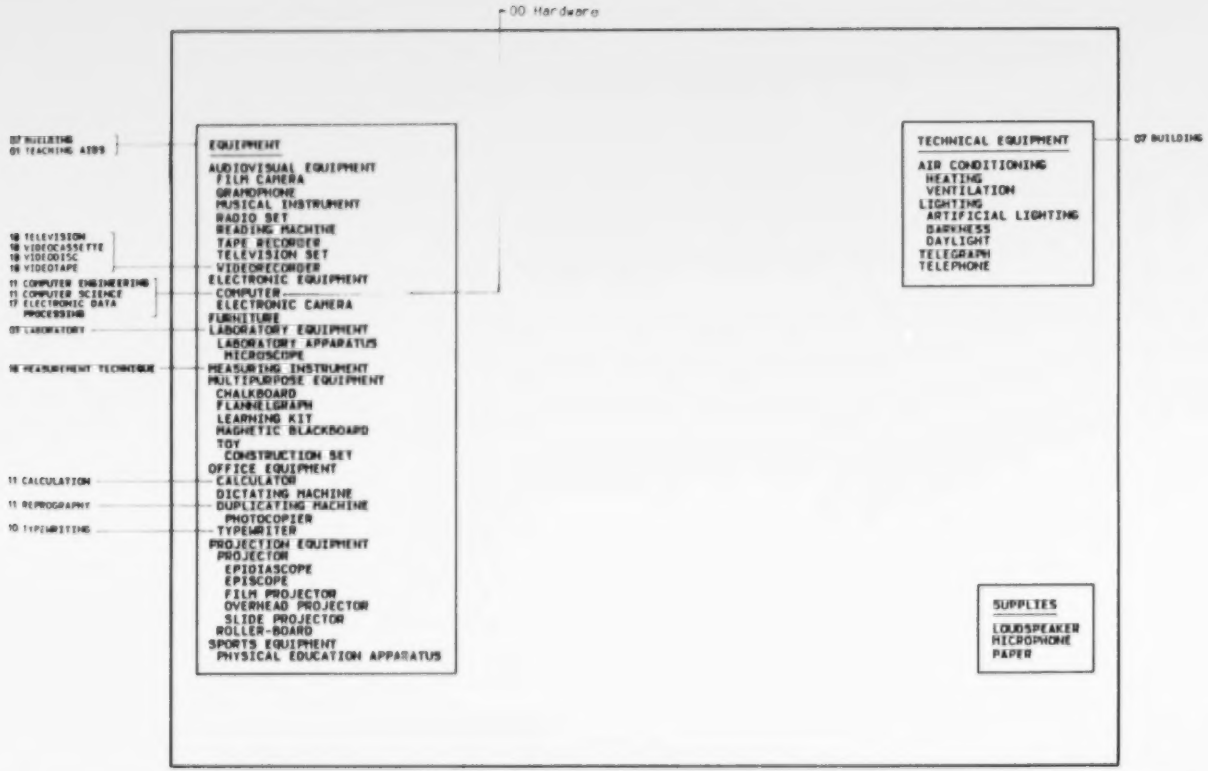
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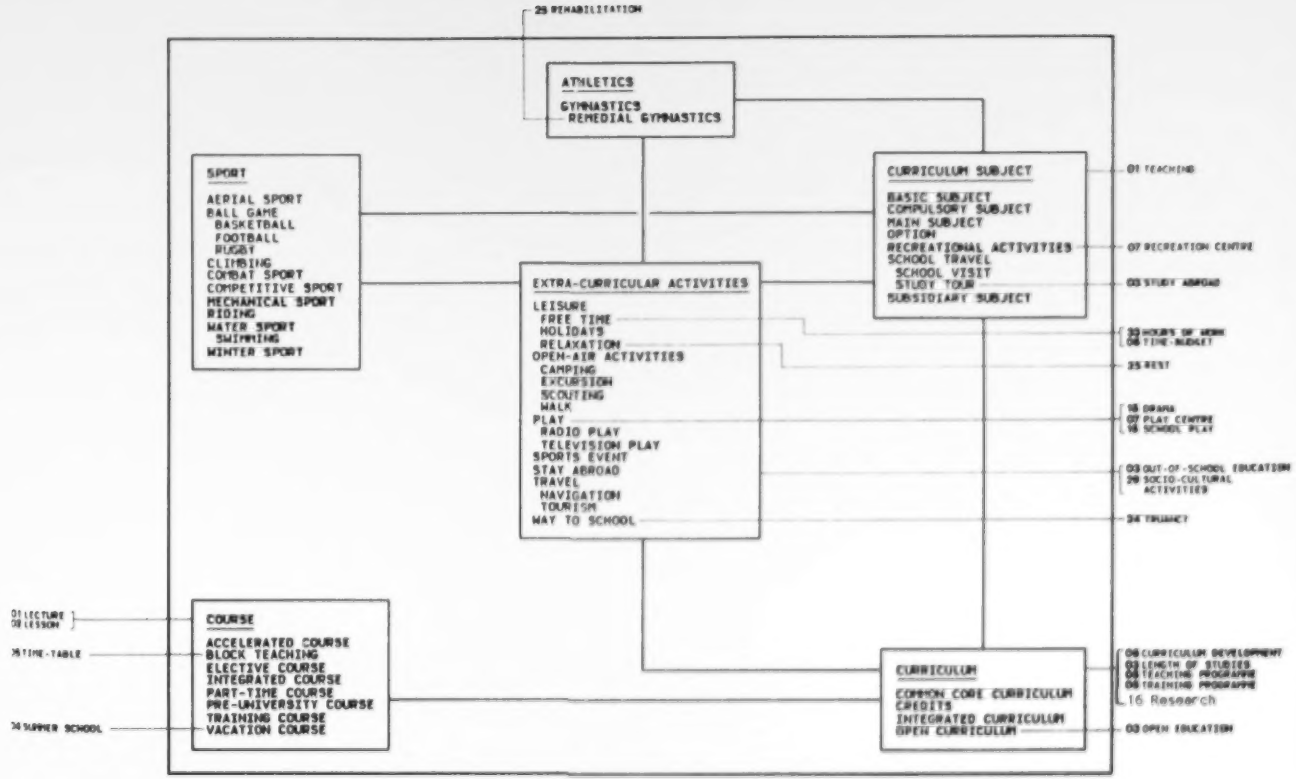
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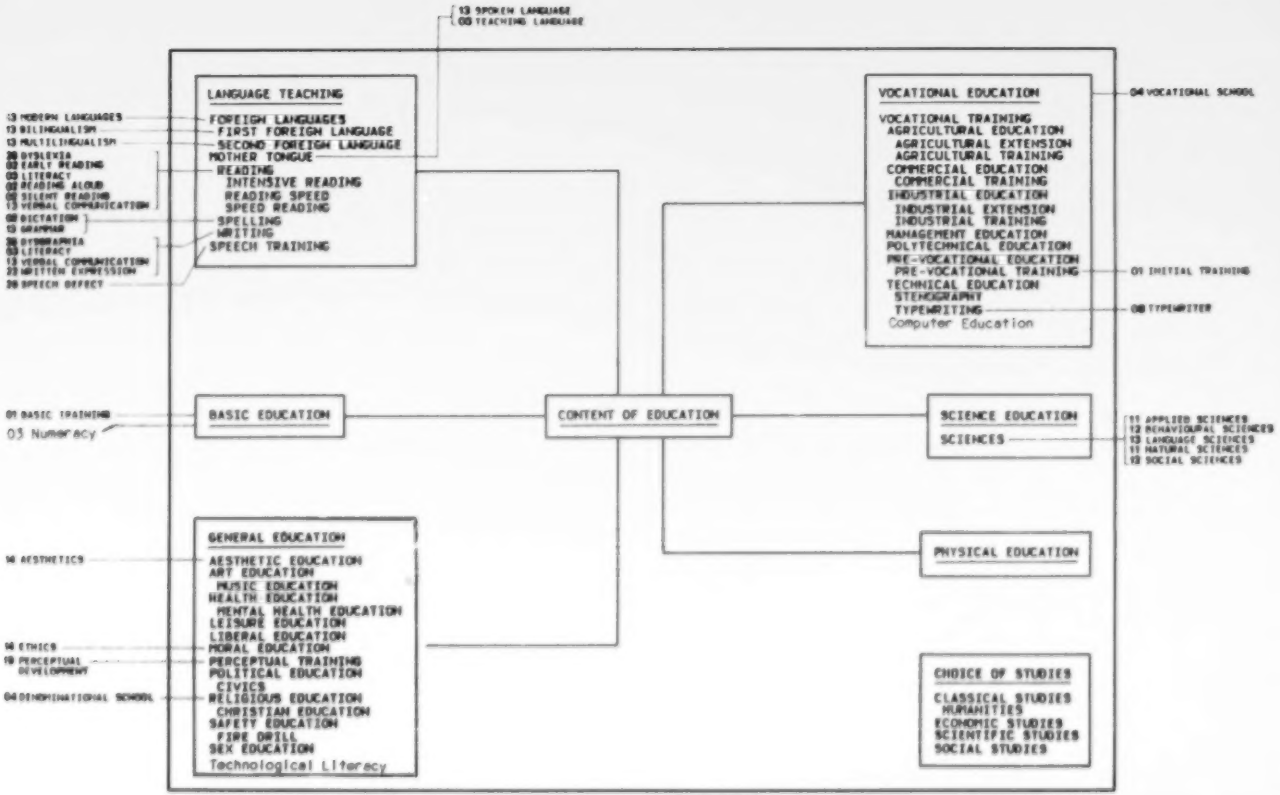
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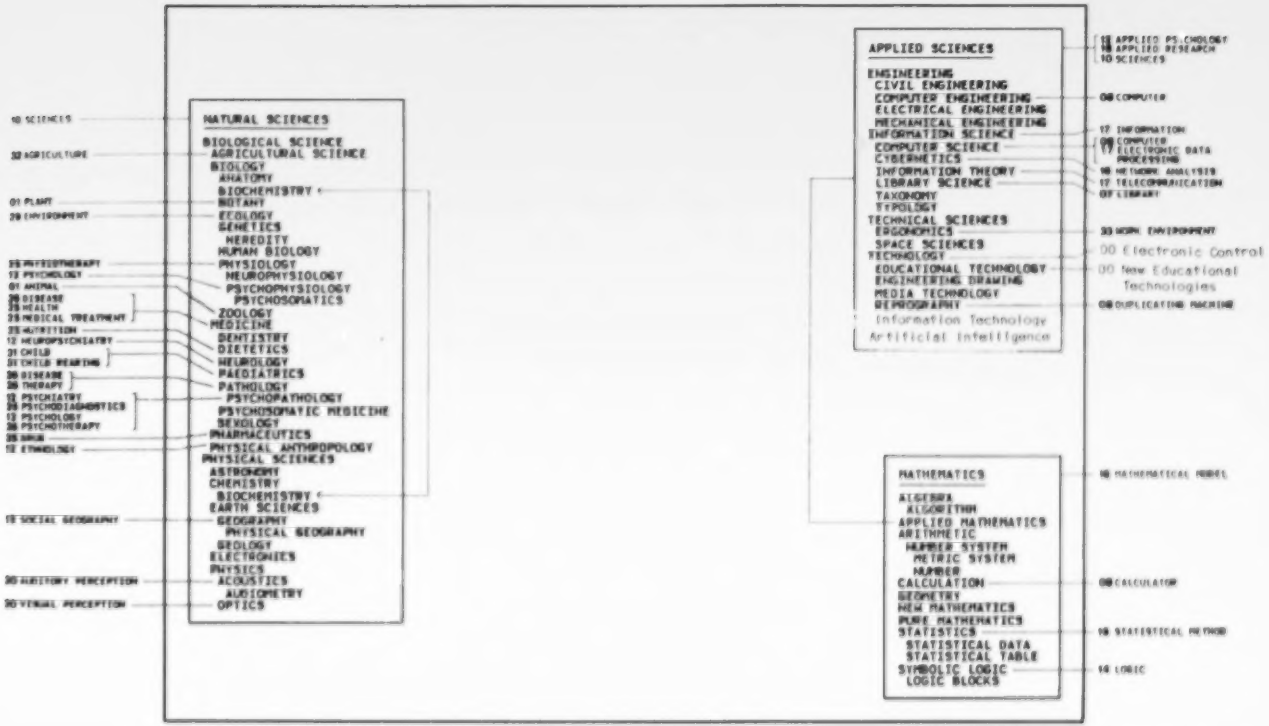
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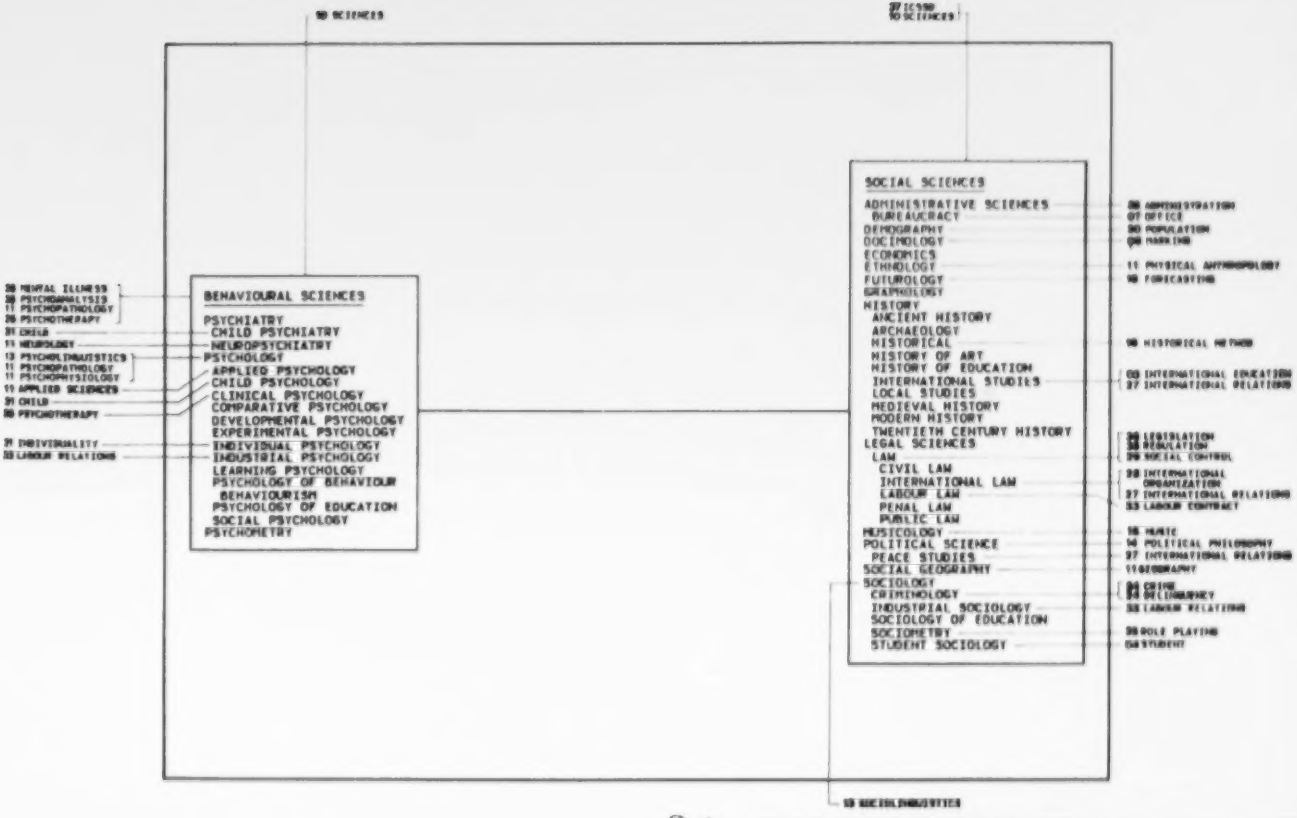
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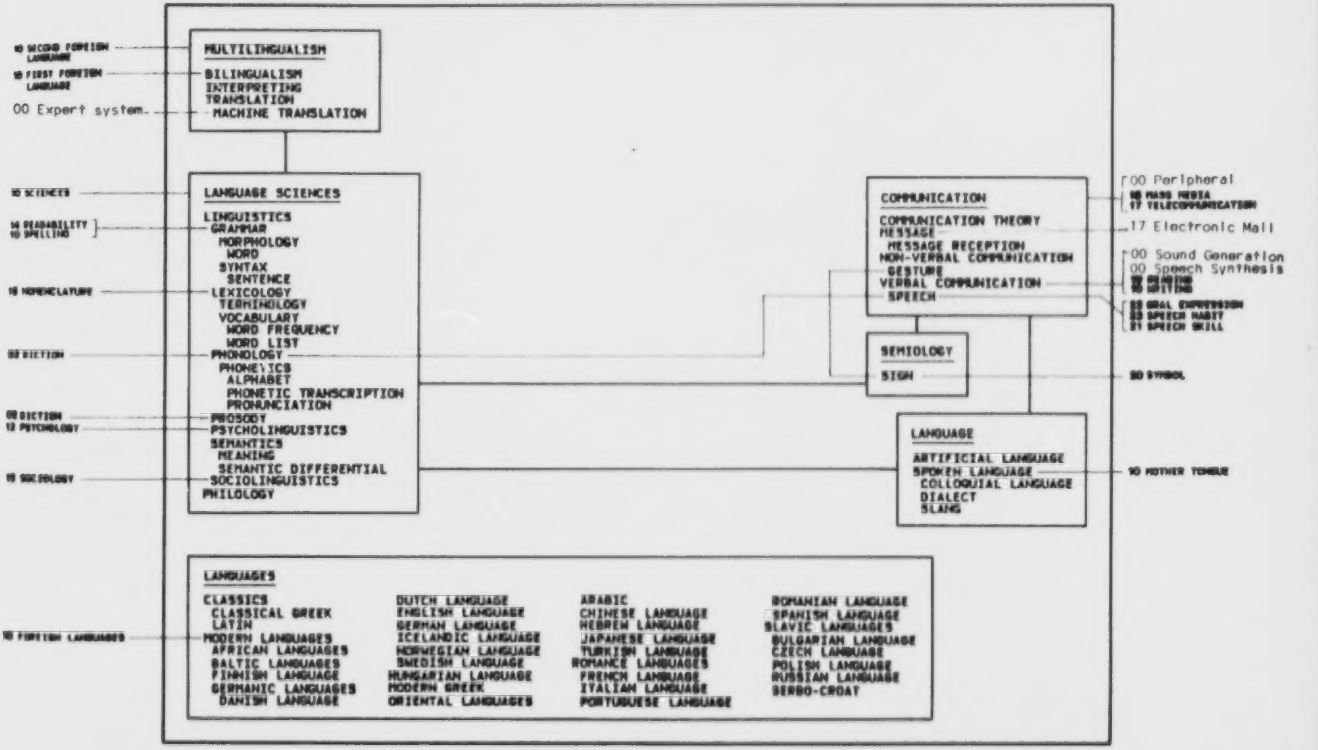
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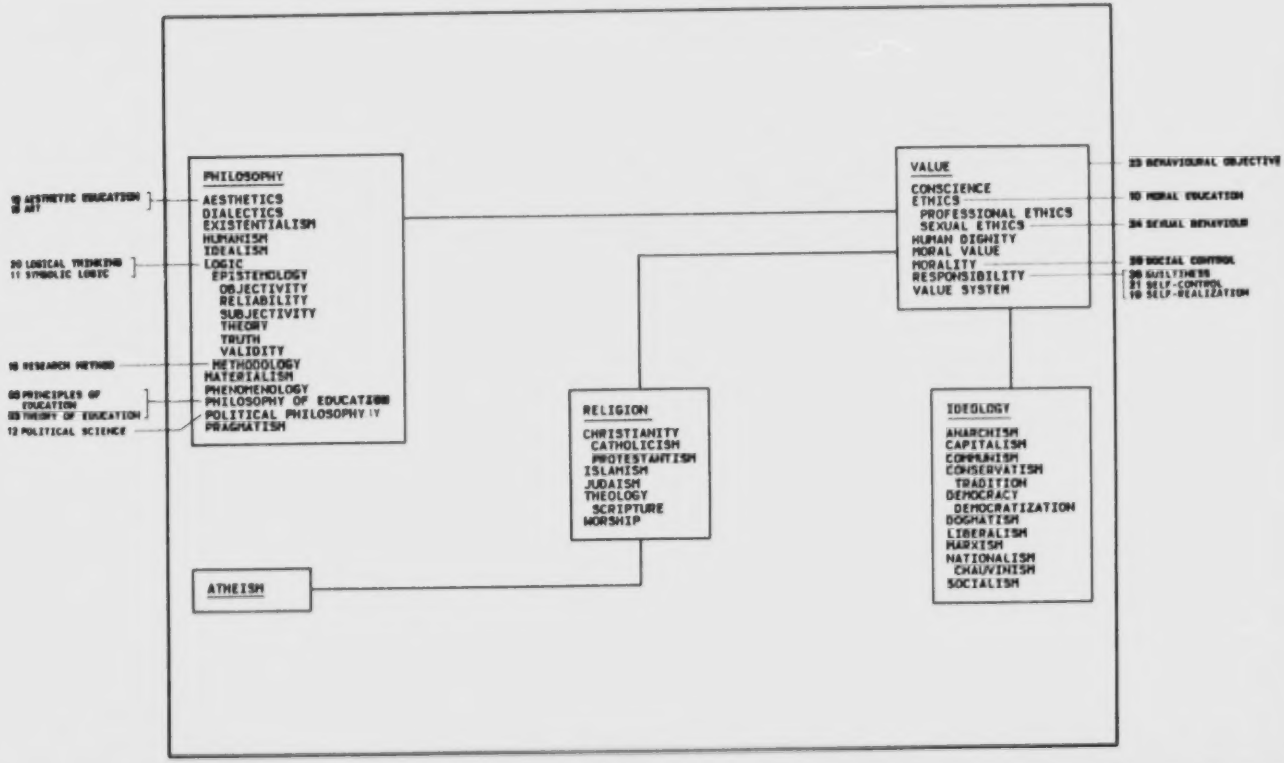
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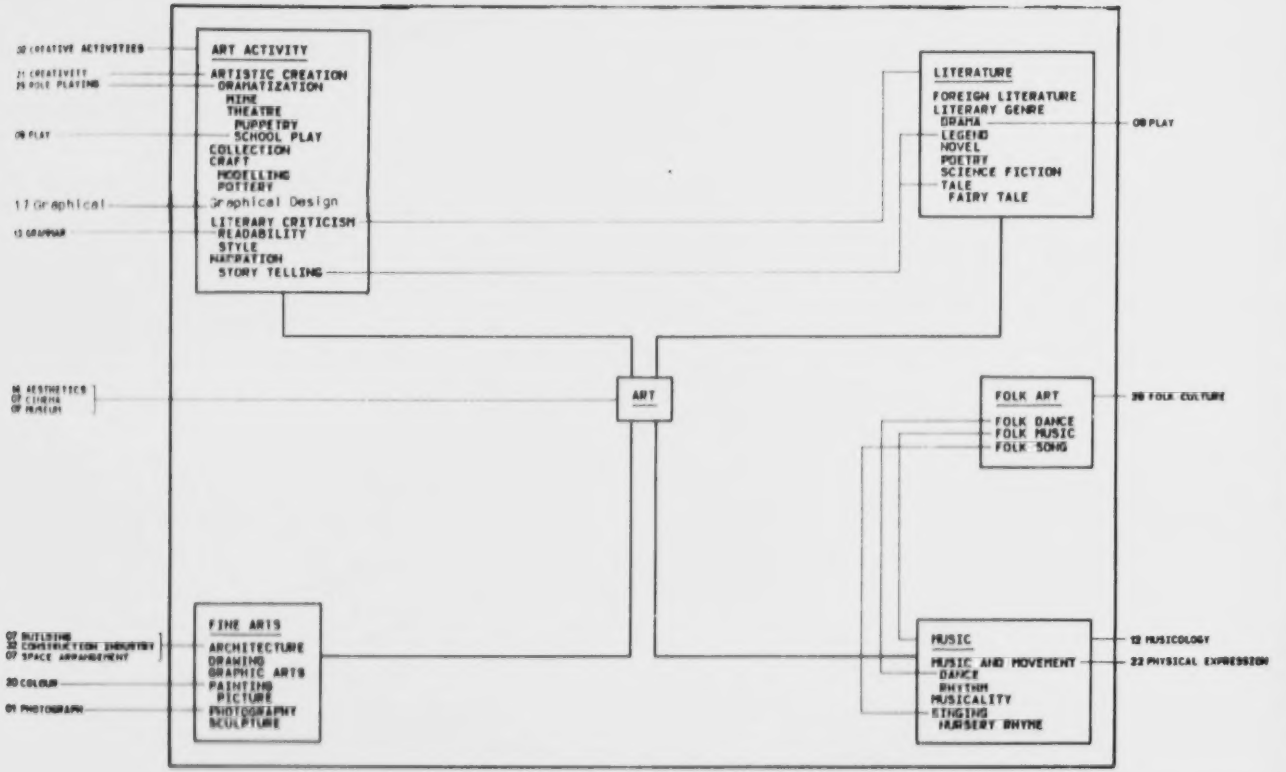
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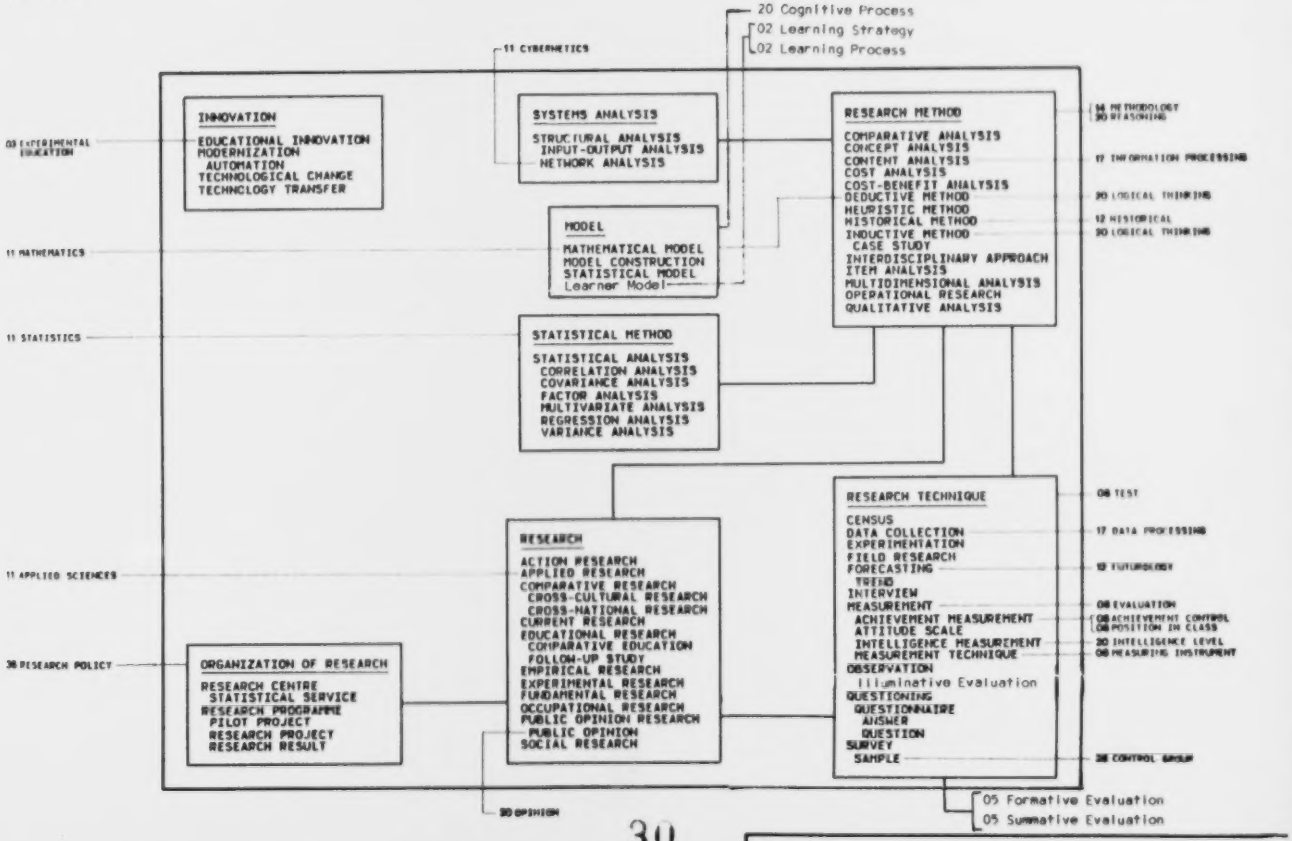
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08 ACHIEVEMENT CONTROL
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20 INTELLIGENCE LEVEL
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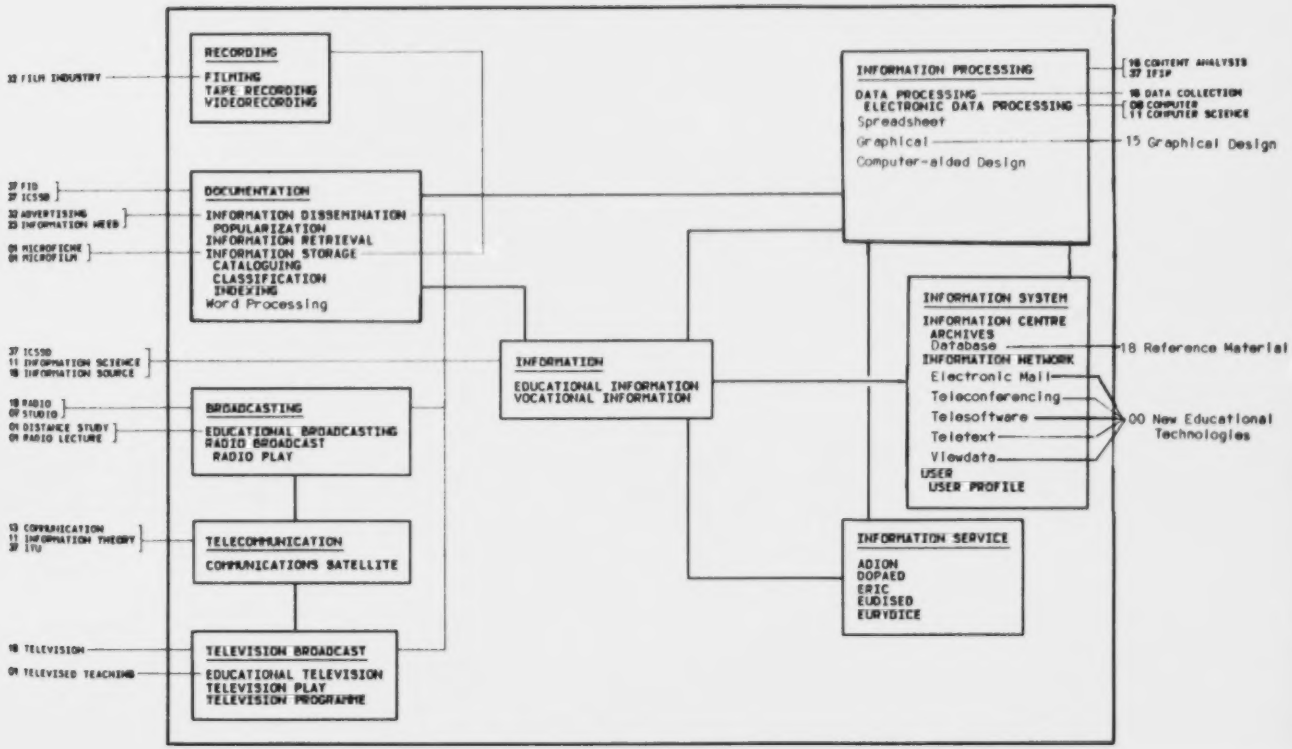
28 CONTROL SAMPLE
05 Formative Evaluation
05 Summative Evaluation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ERIC
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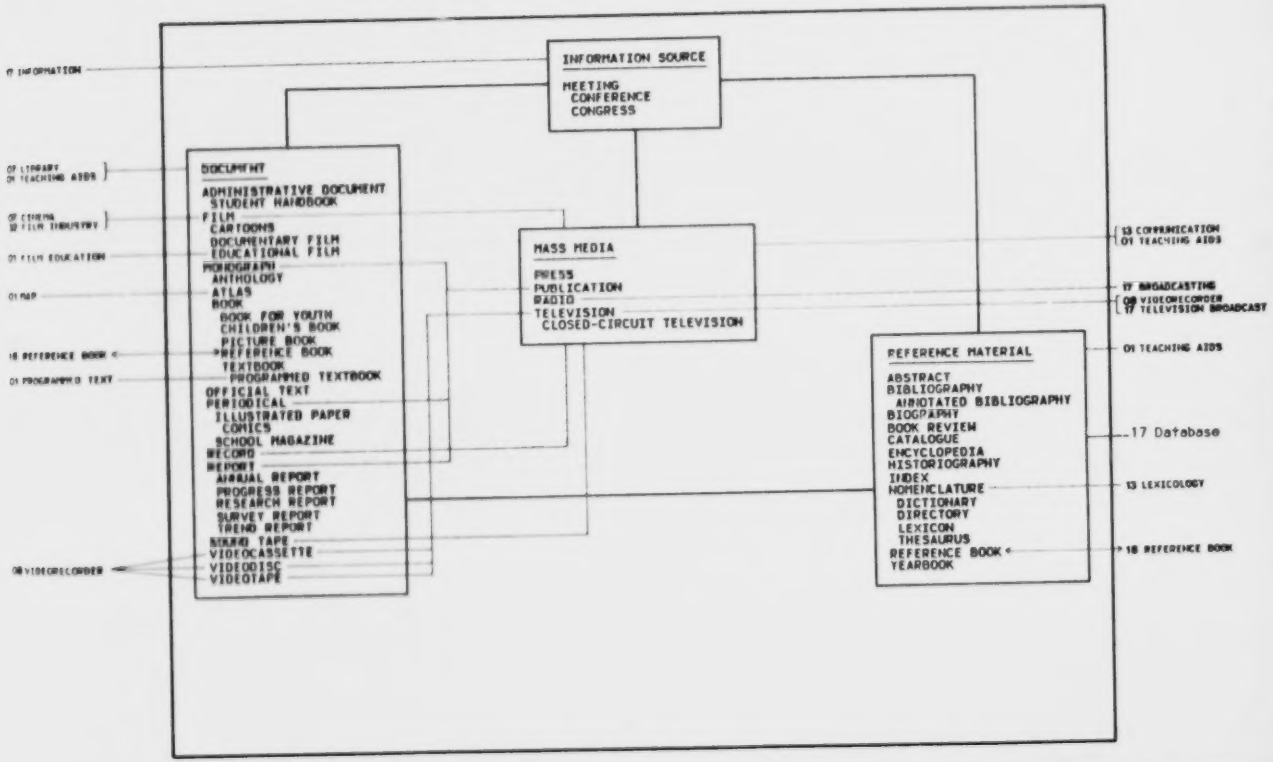
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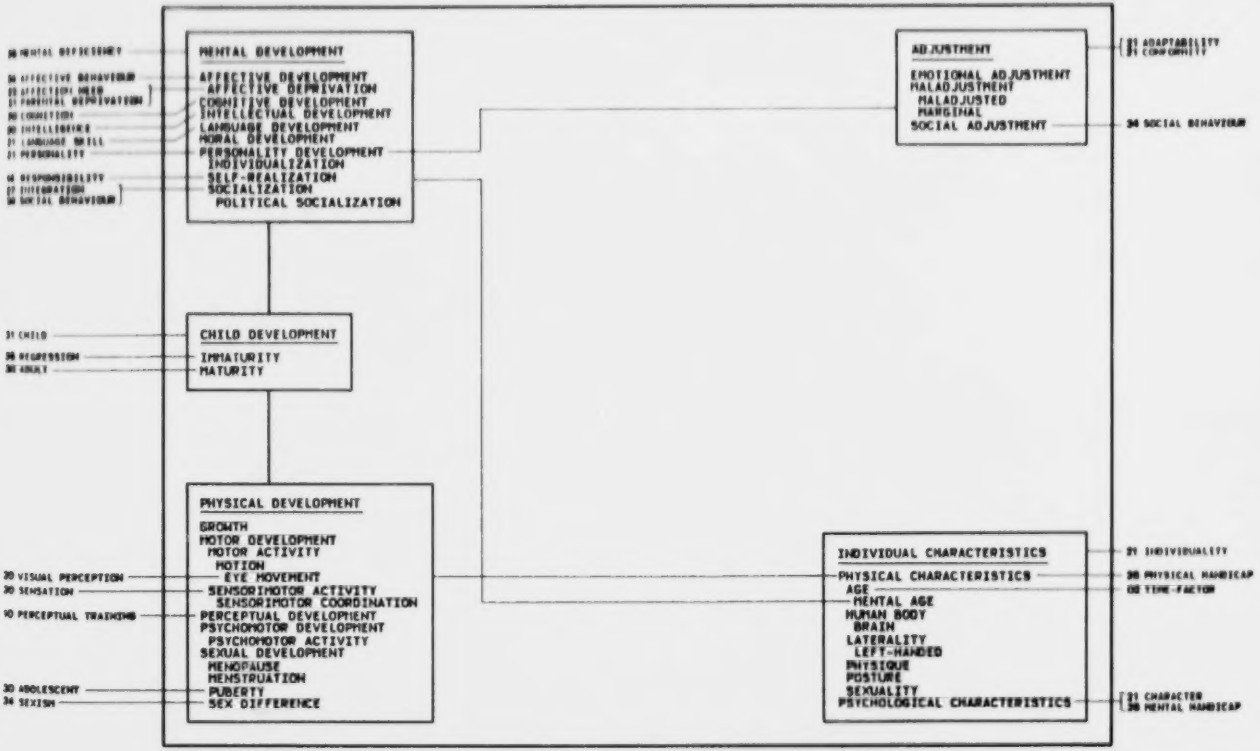
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SOCIALIZATION
POLITICAL SOCIALIZATION
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GROWTH
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EYE MOVEMENT
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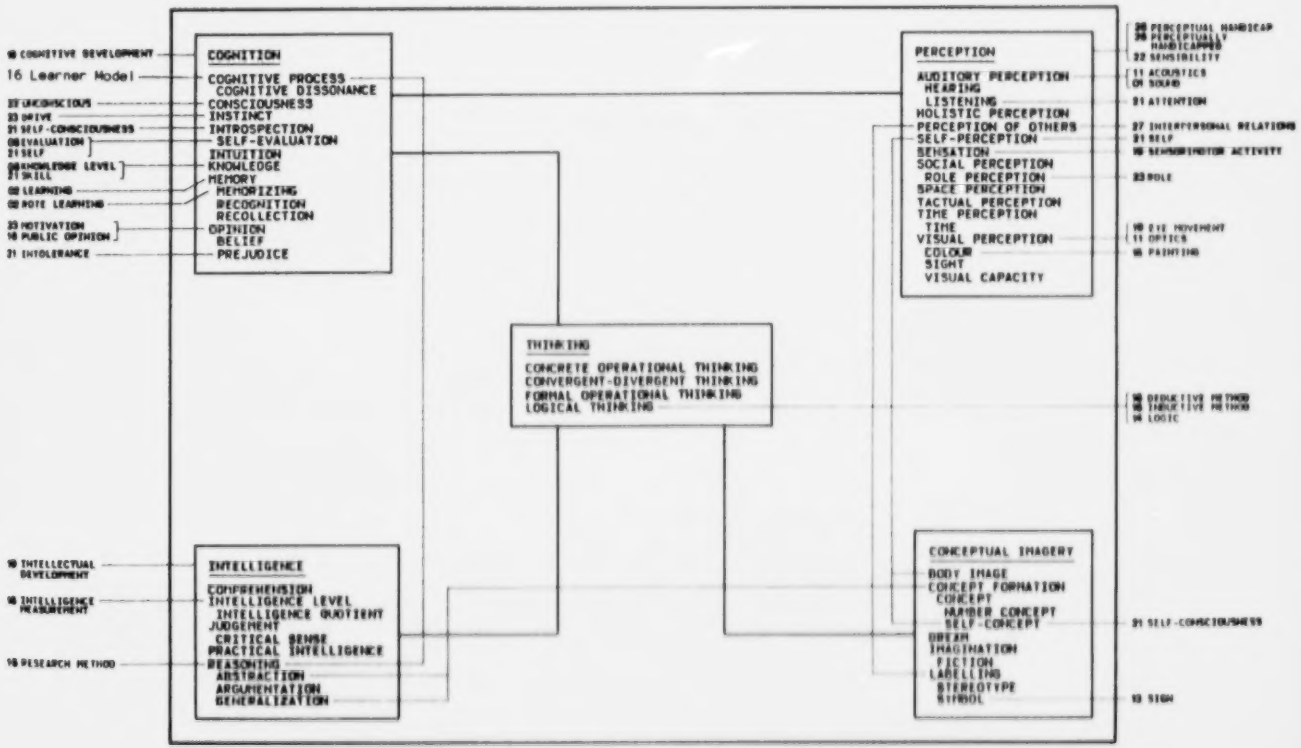

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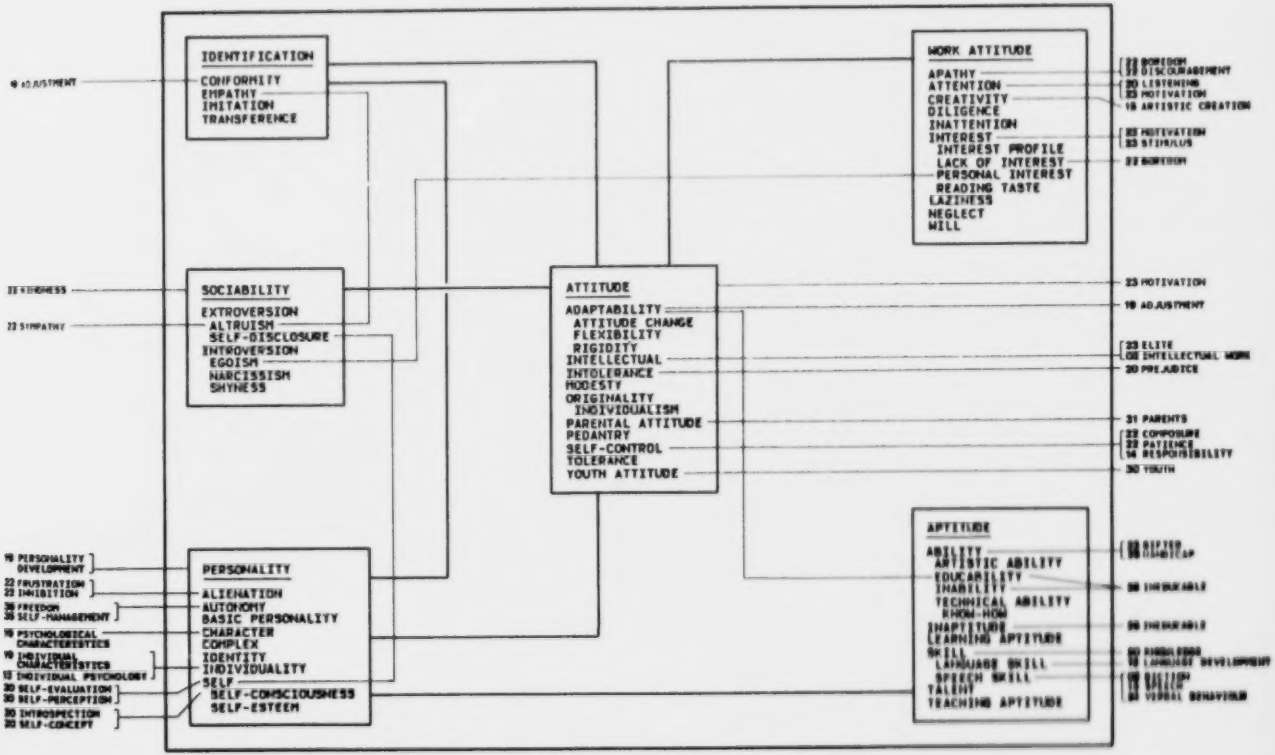
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EGOISM
NARCISSISM
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PERSONALITY
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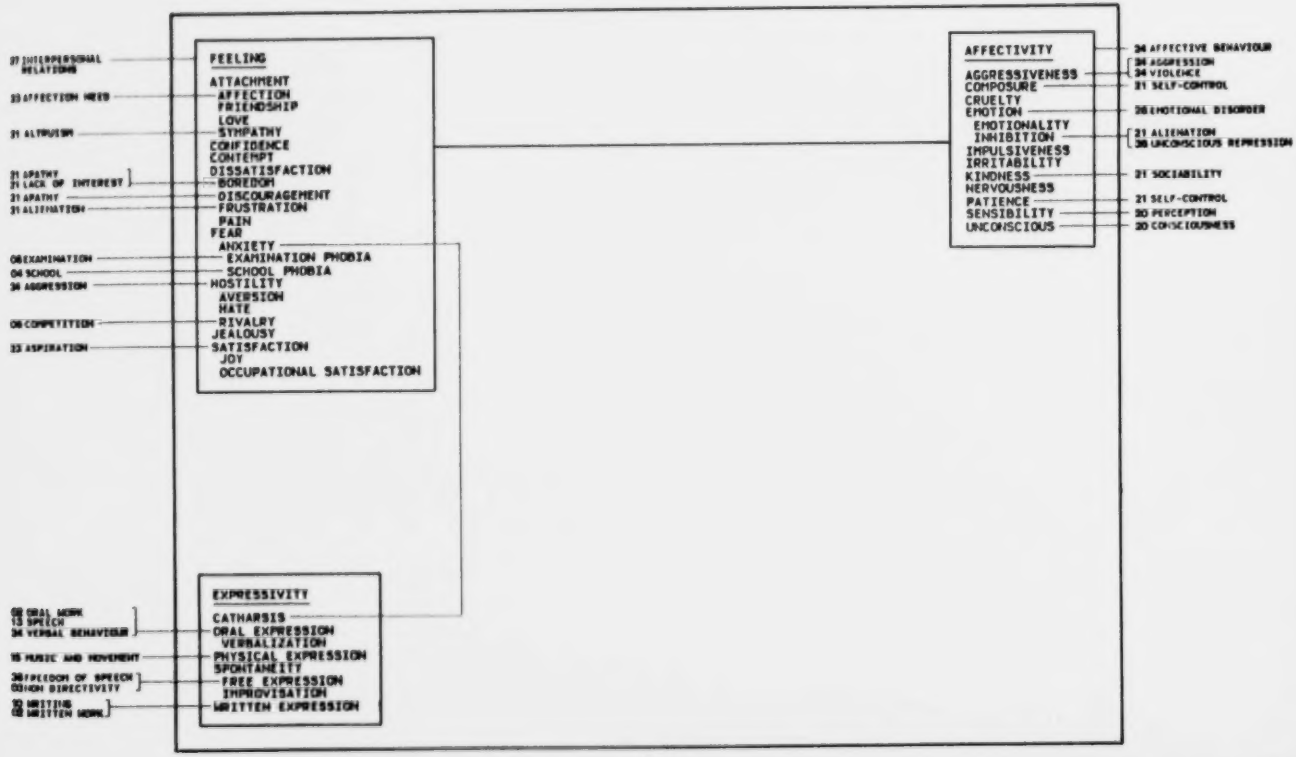
TALENT
TEACHING APTITUDE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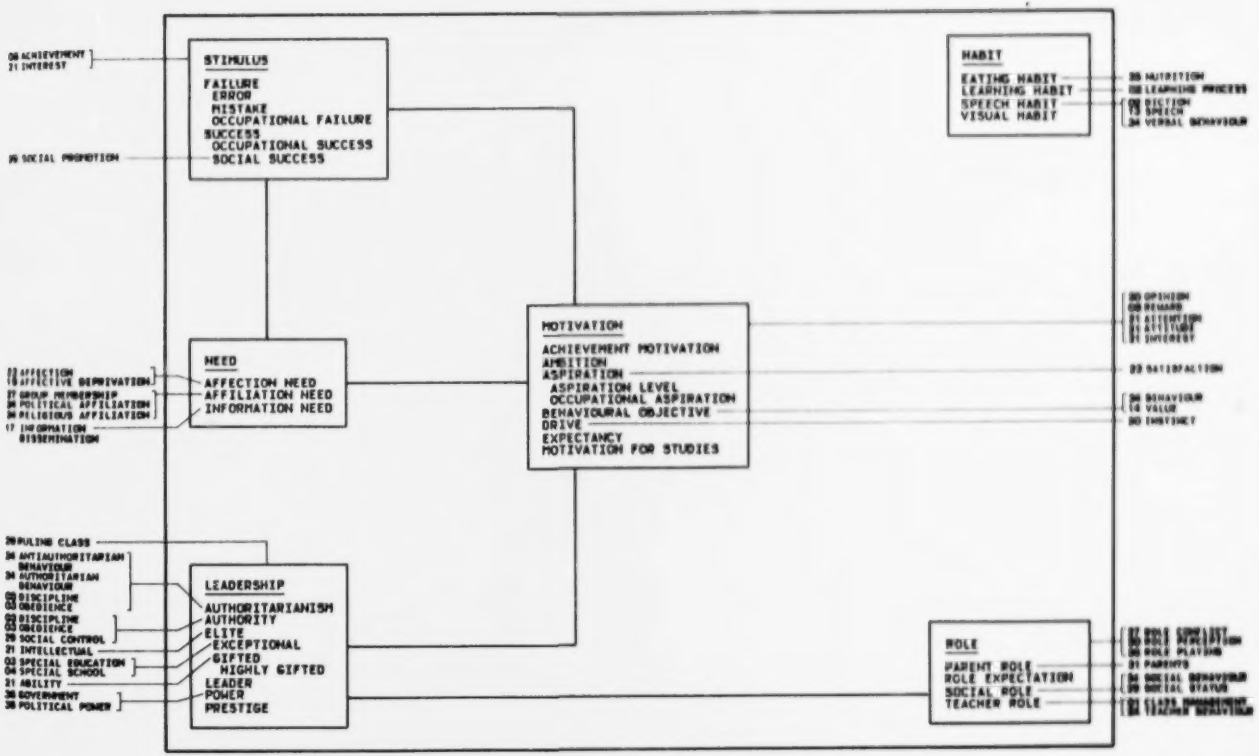

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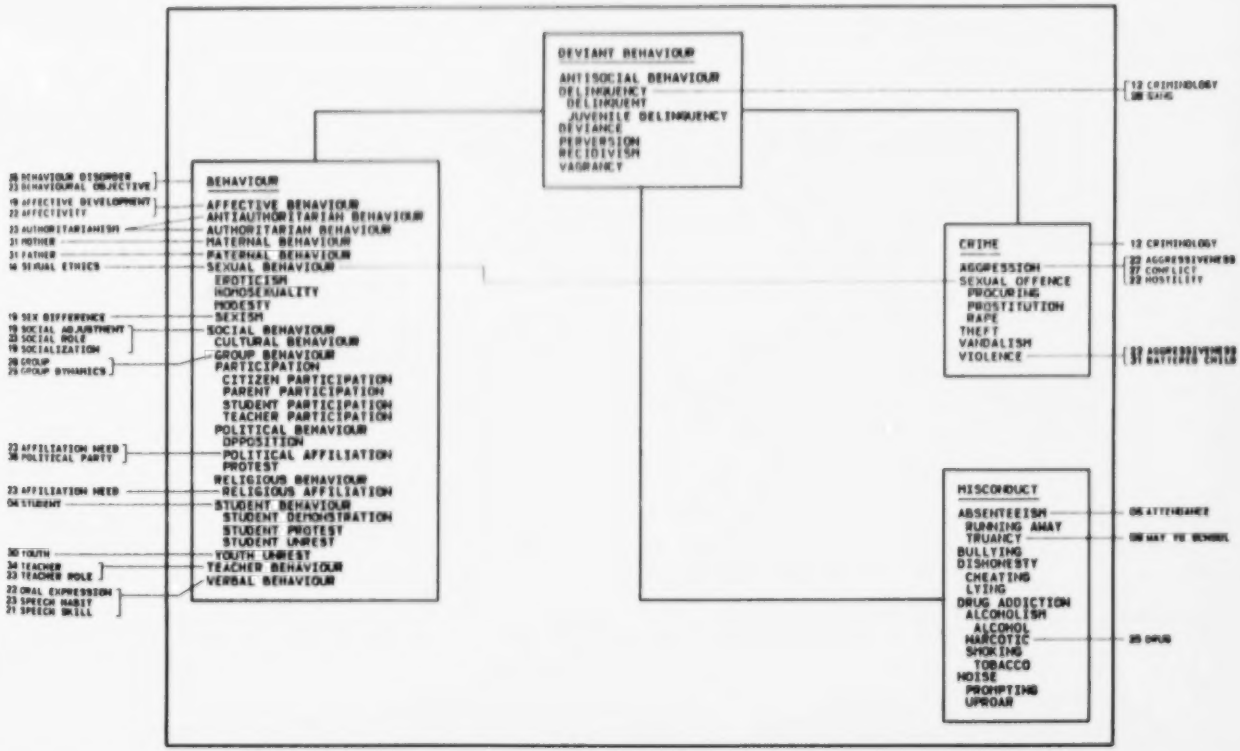
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AUTHORITARIAN BEHAVIOUR
MATERNAL BEHAVIOUR
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POLITICAL AFFILIATION
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STUDENT UNREST
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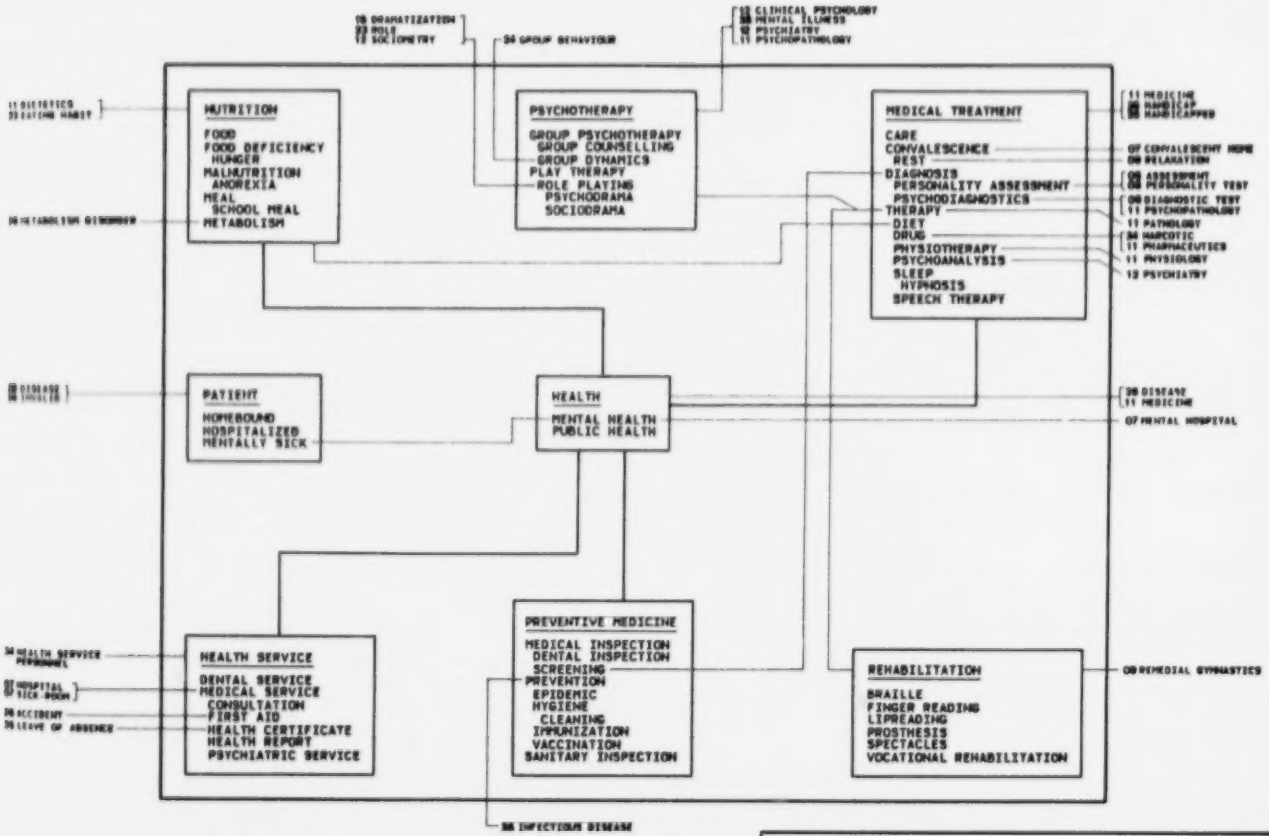
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GROUP PSYCHOTHERAPY
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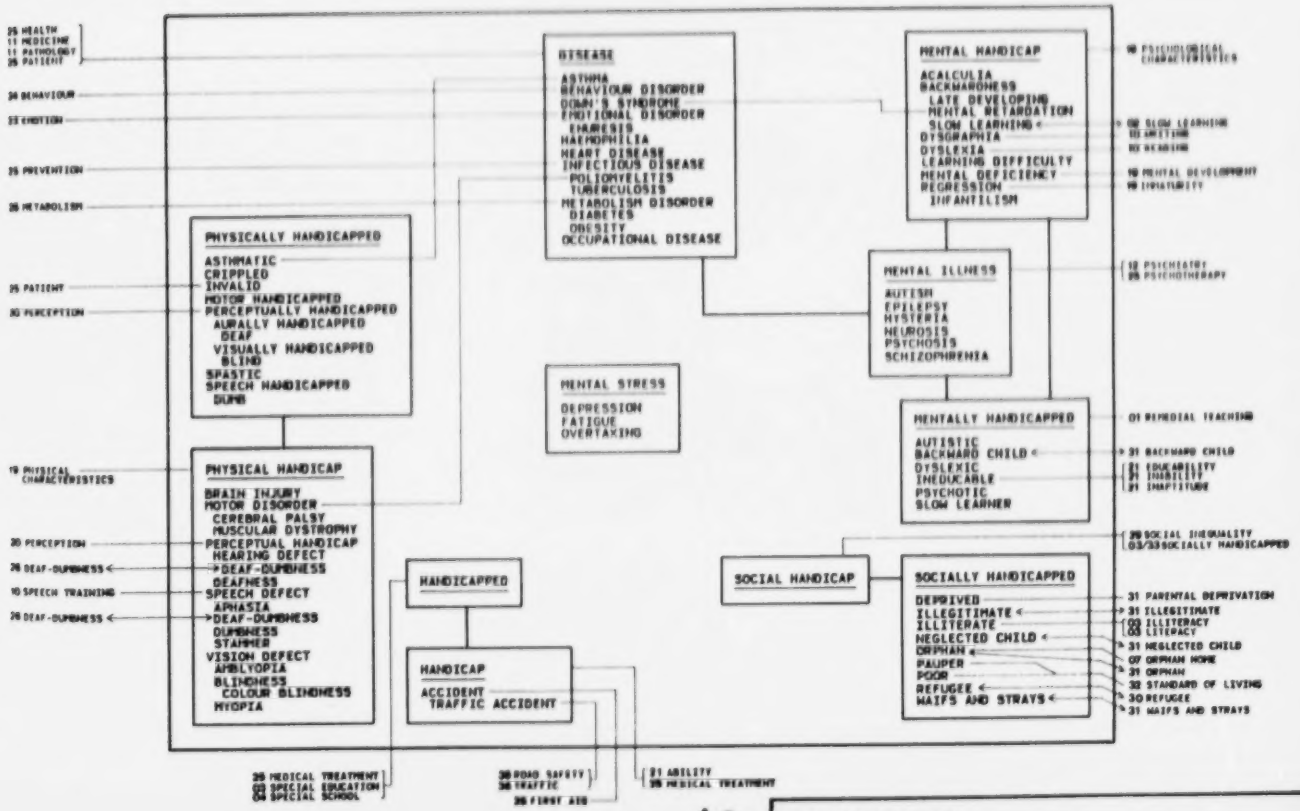
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24 BEHAVIOUR
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26 METABOLISM
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MUSCULAR DYSTROPHY
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COLOUR BLINDNESS
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PSYCHOTIC
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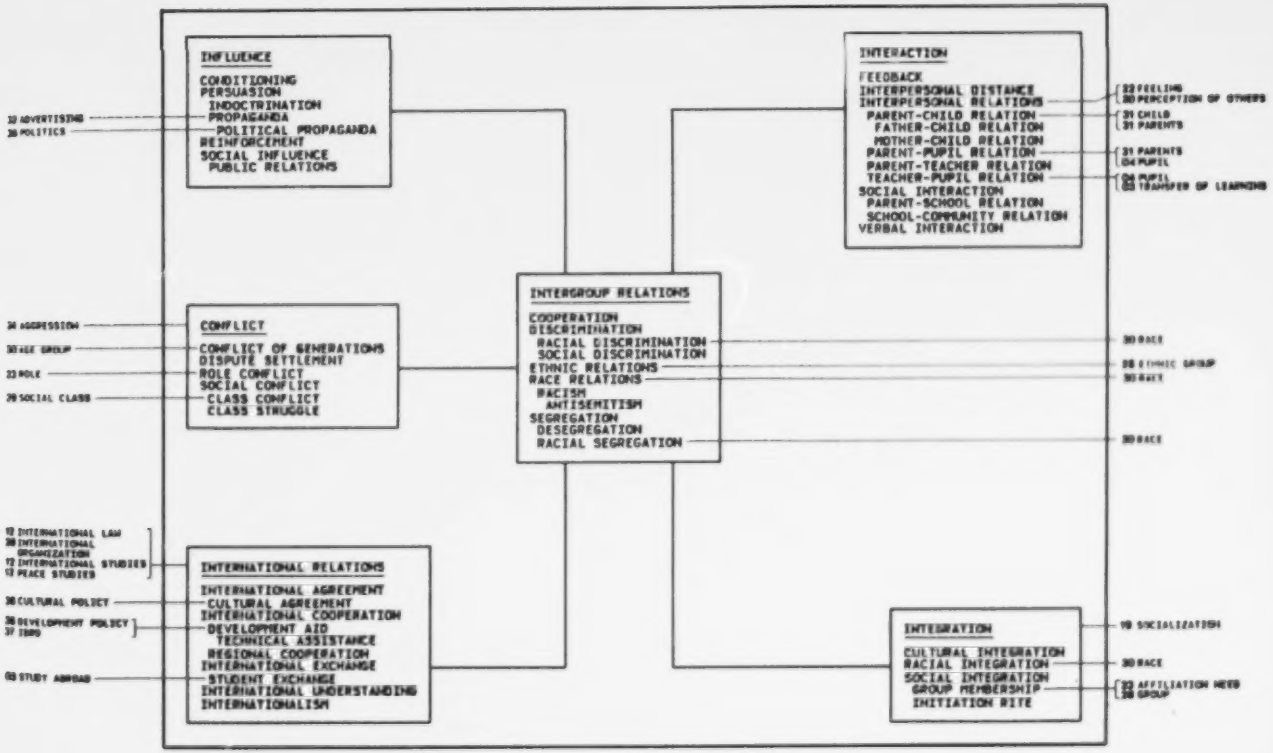
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RACE RELATIONS
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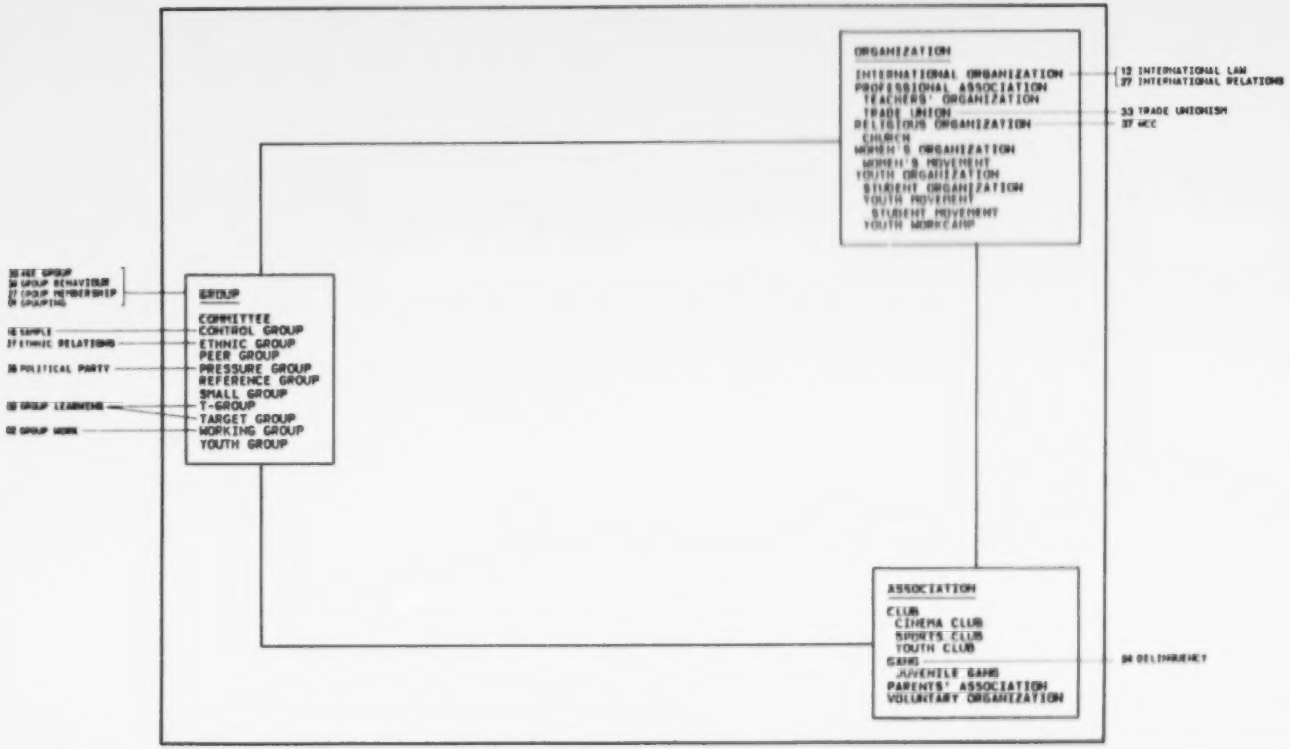
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TEACHERS' ORGANIZATION
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RELIGIOUS ORGANIZATION
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CLUB
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GANG
JUVENILE GANG
PARENTS' ASSOCIATION
VOLUNTARY ORGANIZATION
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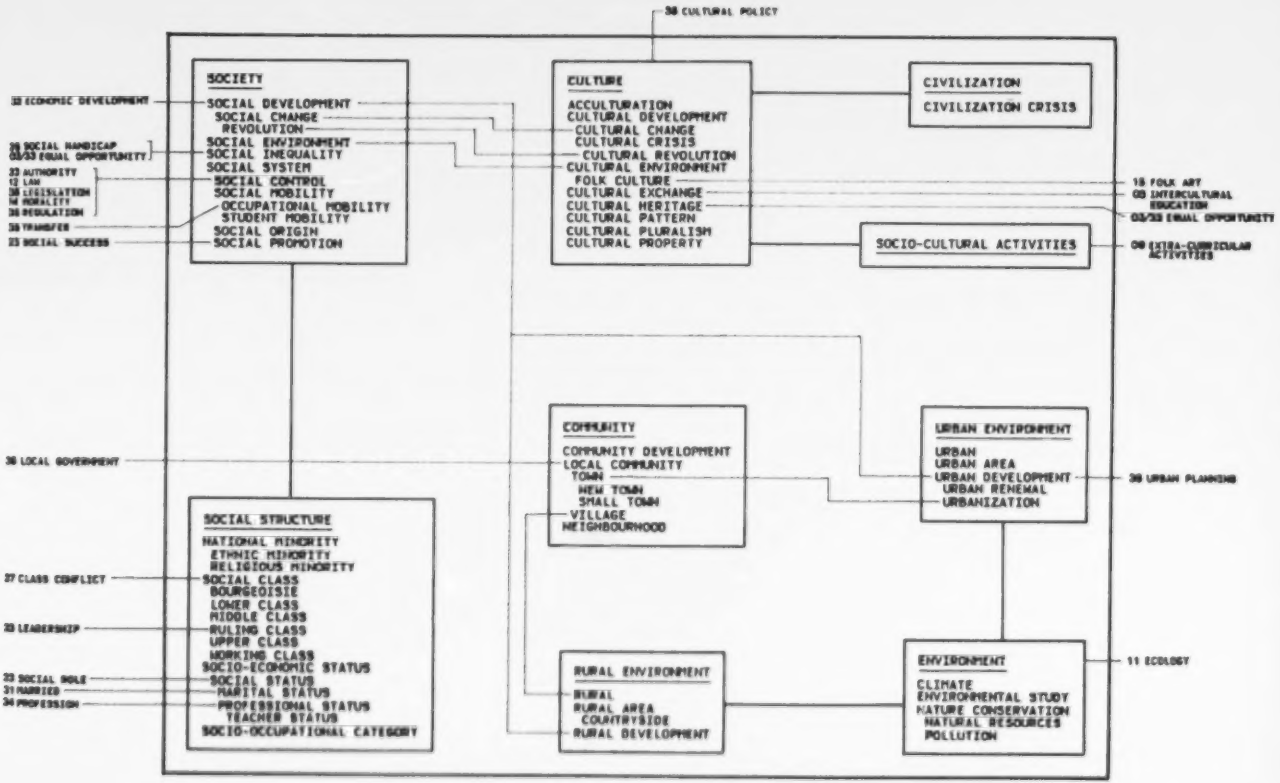
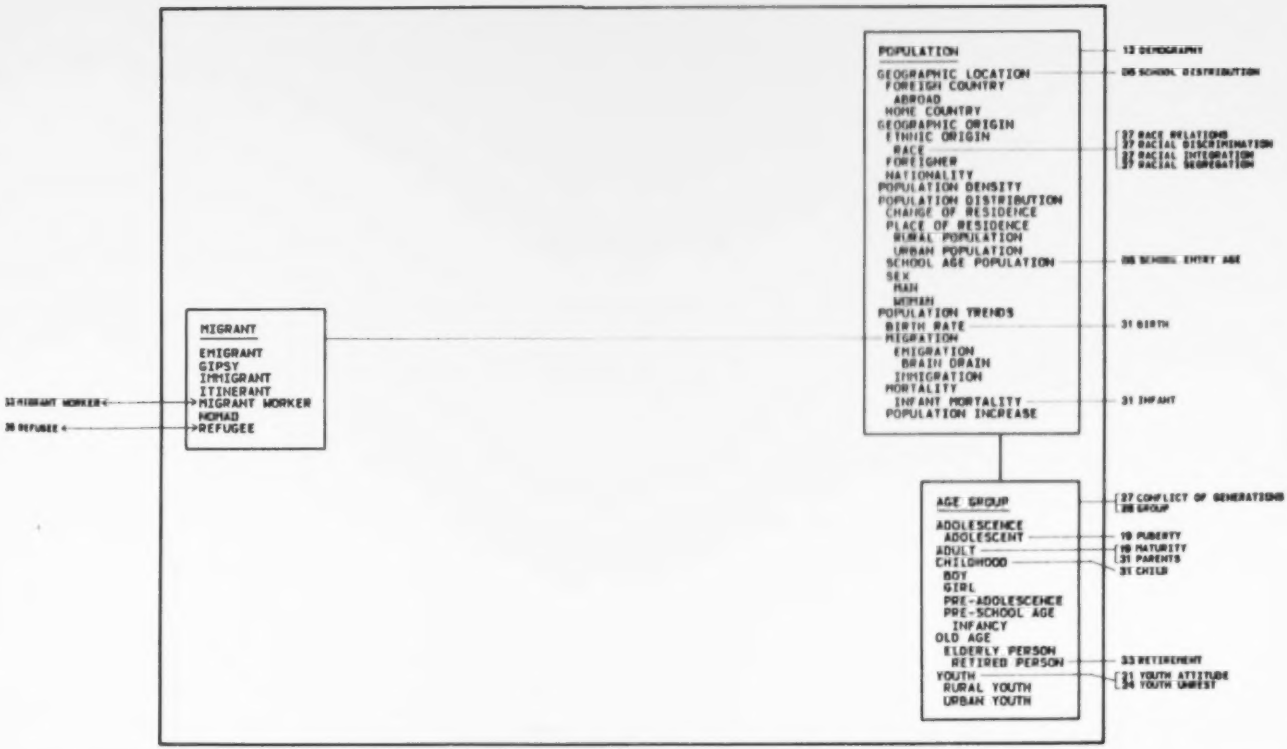


29 SOCIO-CULTURAL ENVIRONMENT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NATIONALITY
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PLACE OF RESIDENCE
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SCHOOL AGE POPULATION
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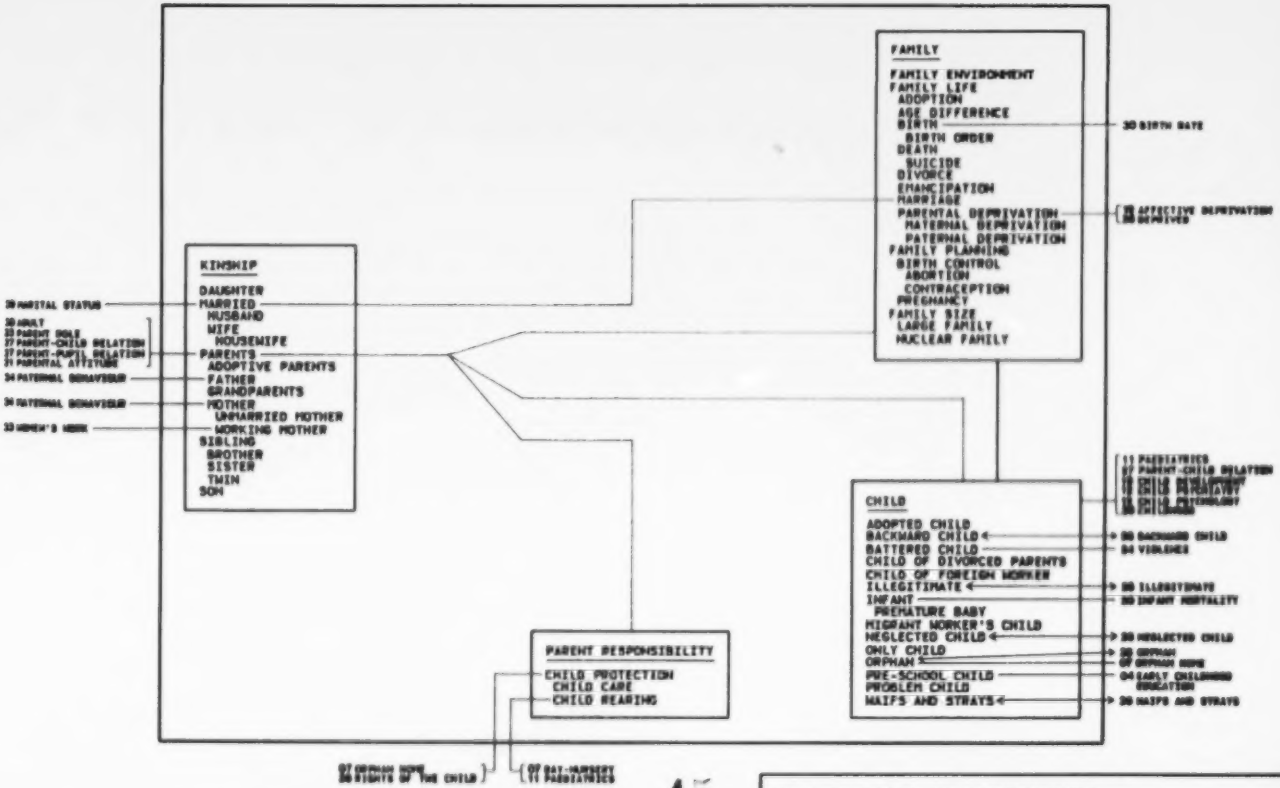
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FAMILY LIFE
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BROTHER
SISTER
TWIN
SON
CHILD
ADOPTED CHILD
BACKWARD CHILD
BATTERED CHILD
CHILD OF DIVORCED PARENTS
CHILD OF FOREIGN WORKER
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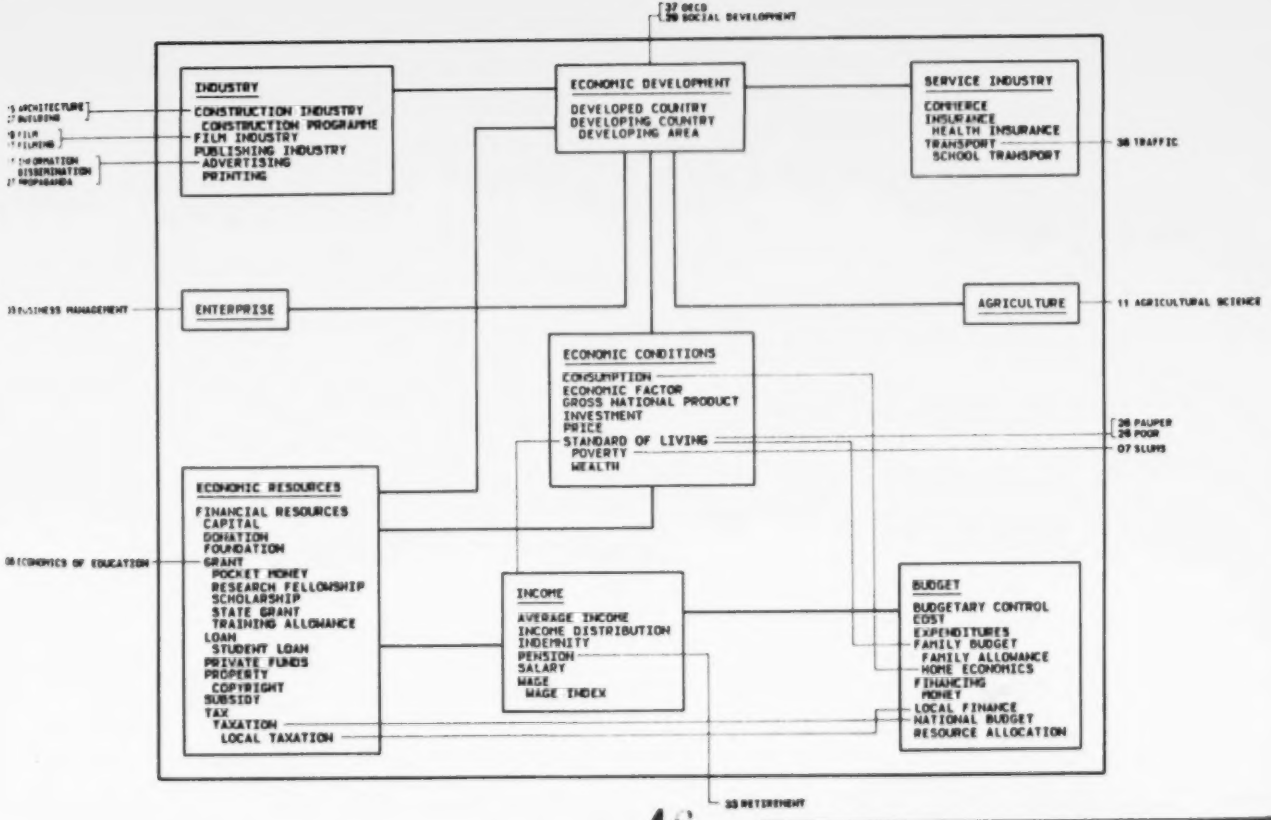
INFANT
PREMATURE BABY
MIGRANT WORKER'S CHILD
NEGLECTED CHILD
ONLY CHILD
ORPHAN
PRE-SCHOOL CHILD
PROBLEM CHILD
WAIFS AND STRAYS
PARENT RESPONSIBILITY
CHILD PROTECTION
CHILD CARE
CHILD REARING


37 OECD
39 SOCIAL DEVELOPMENT
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CONSTRUCTION PROGRAMME
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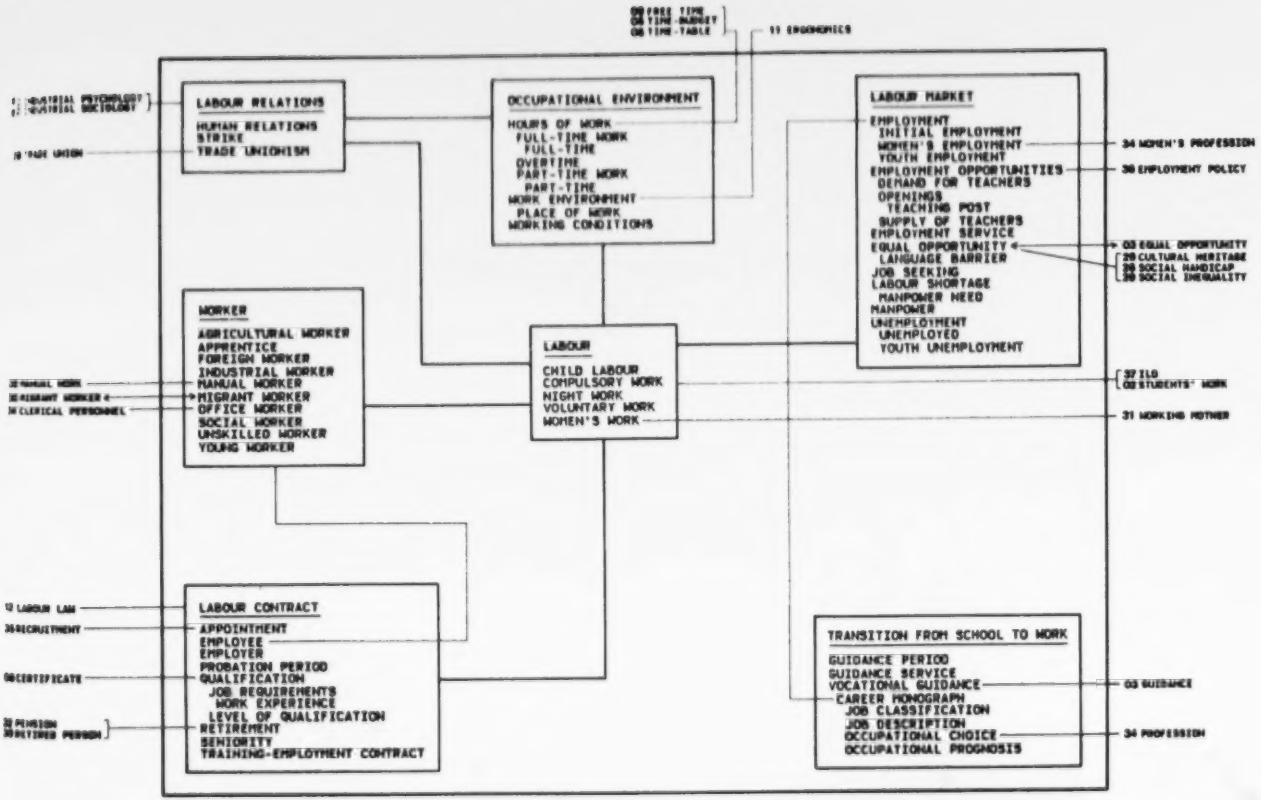
LABOUR RELATIONS
HUMAN RELATIONS
STRIKE
TRADE UNIONISM
TRADE UNION
OCCUPATIONAL ENVIRONMENT
HOURS OF WORK
FULL-TIME WORK
FULL-TIME
OVERTIME
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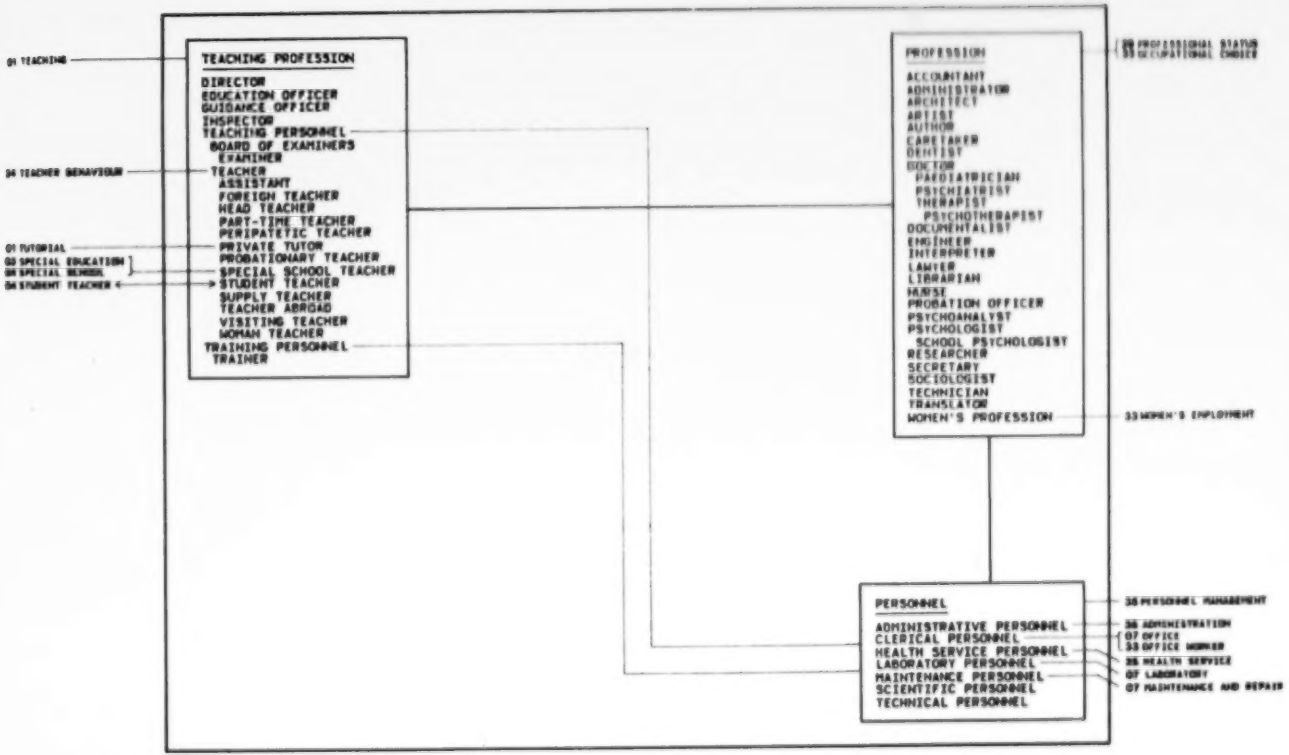
01 TEACHING
34 TEACHER BEHAVIOUR
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02 SPECIAL EDUCATION
02 SPECIAL SCHOOL
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ACCOUNTANT
ADMINISTRATOR
ARCHITECT
ARTIST
AUTHOR
CARETAKER
DENTIST
DOCTOR
PAEDIATRICIAN
PSYCHIATRIST
THERAPIST
PSYCHOTHERAPIST
DOCUMENTALIST
ENGINEER
INTERPRETER
LAWYER
LIBRARIAN
NURSE
PROBATION OFFICER
PSYCHOANALYST
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07 MAINTENANCE AND REPAIR
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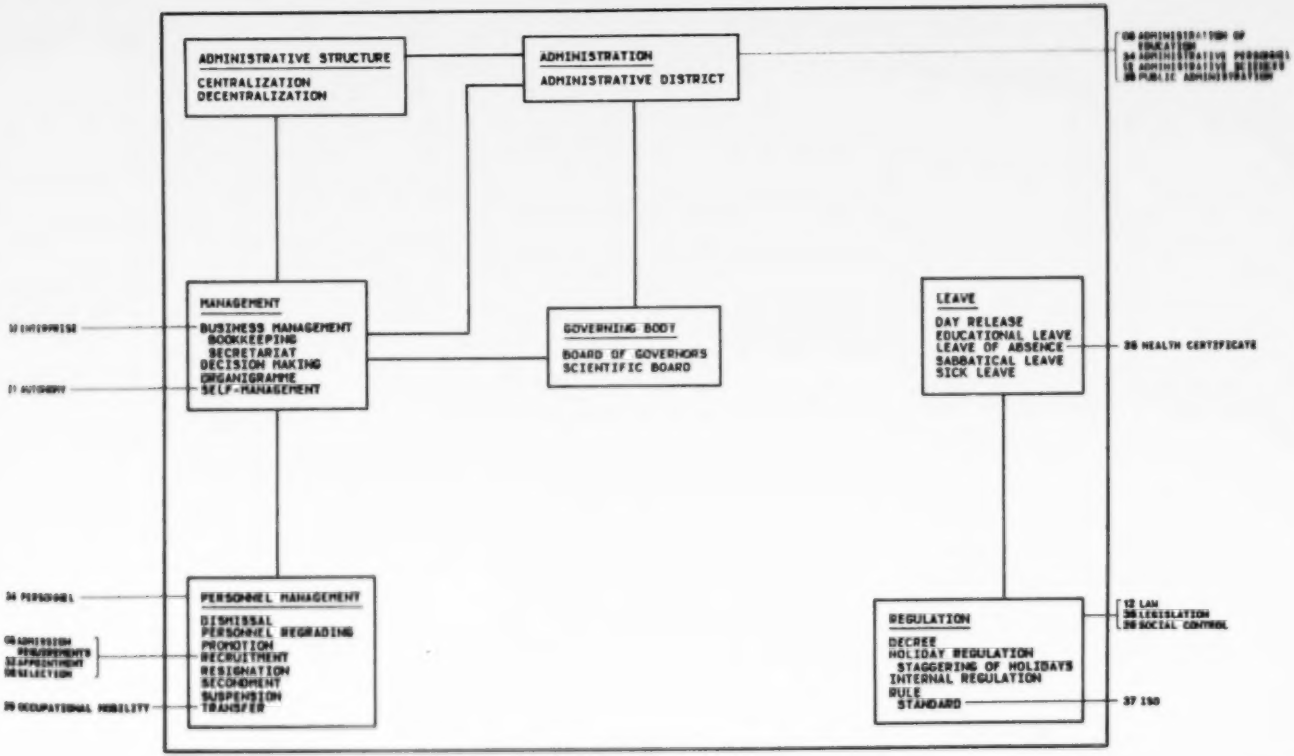
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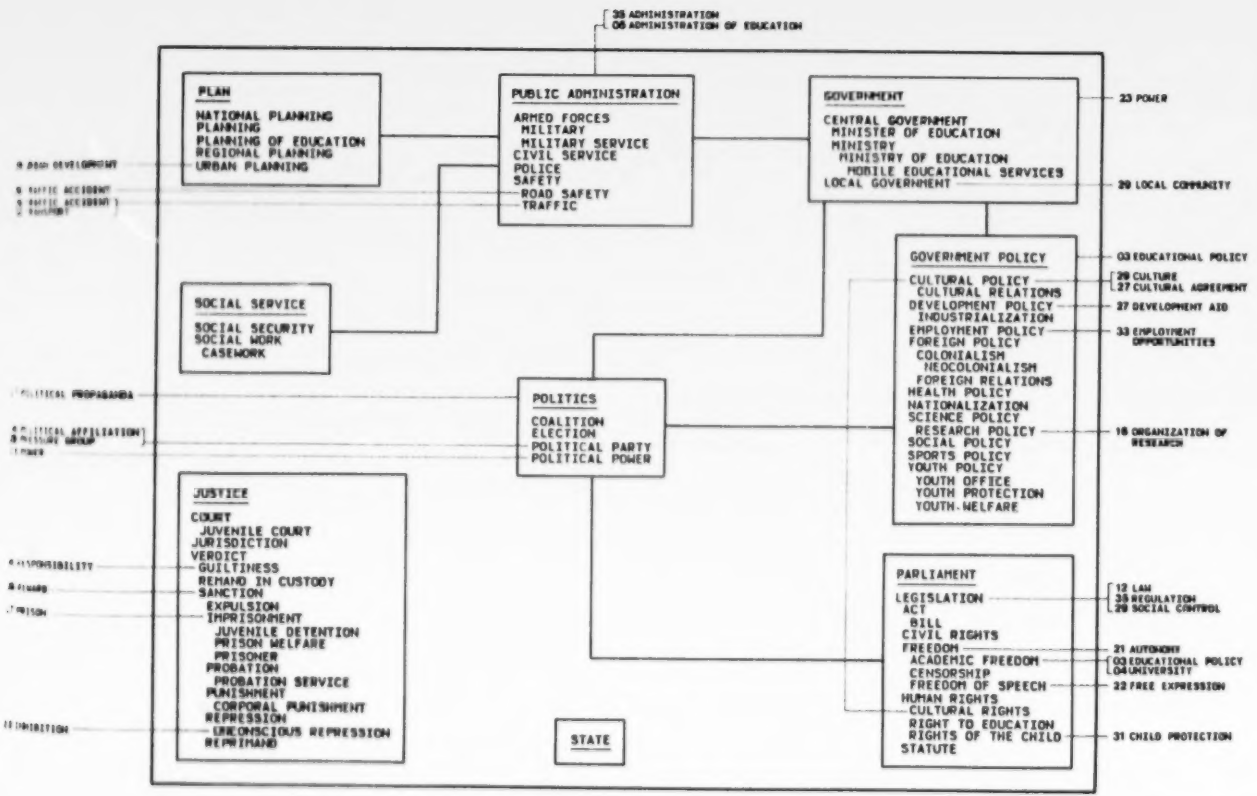
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PRISON WELFARE
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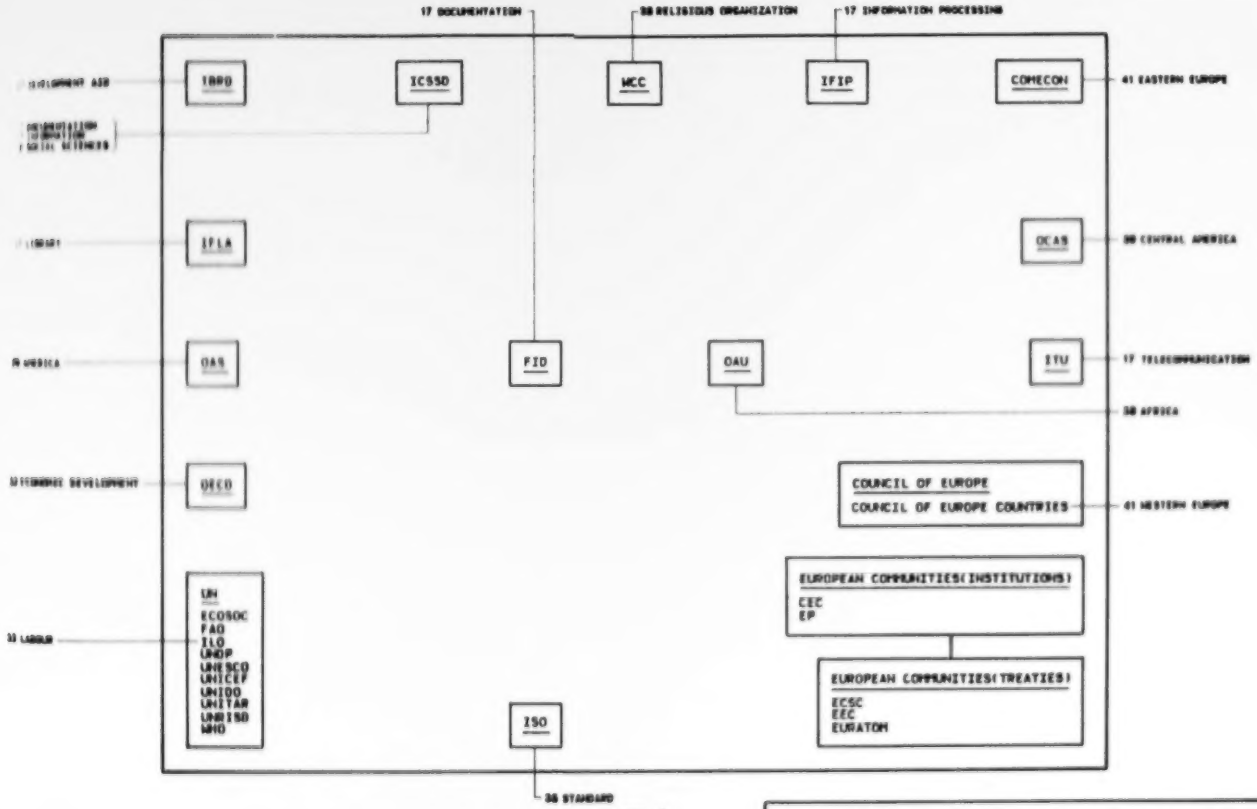

37 INTERNATIONAL ORGANIZATIONS

INFORMATION TECHNOLOGY AND EDUCATION: THE ESRC PROGRAMME

The Education and Human Development Committee was established with the reorganisation of the then Social Science Research Council in May 1982. In 1984 the Council changed its name to the Economic and Social Research Council. Early in 1983 the Committee identified and circulated for discussion an initial listing of important topics which warranted expanded support or accelerated development. The broad area of Information Technology in Education occupied a prominent place in that list. The Committee emphasised its intention that research would be centred not only on the effect on education of machines to help teach the existing curriculum, but on the development and adaptation of the curriculum to equip people, including those of school age, to deal with intelligent machines and to prepare them for a life changed by their arrival. For example, there are questions concerning both cognitive and organisational factors which facilitate or inhibit the adoption of Information Technology in Education, and allied to these, questions around the nature, characteristics and development of information technology literacy. These initial topics remain central to the Committee's projected agenda.

Two reports were commissioned and detailed discussion and workshops were held in 1983. In its further considerations, the Committee was conscious of the fact that the research community is widely scattered and has relatively few large groups of researchers. Furthermore, it recognised the importance of involving practitioners and policy makers in the development of its programme of substantive research and research related activities and the necessity of ensuring close collaboration with commercial organisations such as publishers, software houses and hardware manufacturers. It was this thinking that led the Committee away from the establishment of a single new centre to the appointment of a coordinator as the focal point for the development of the initiative throughout the country.

The brief for the Coordinator includes:

- the review, evaluation and dissemination of the recent and current activity in the field of Information Technology and Education;
- the identification of the needs of education in relation to Information Technology;.
- the stimulation of relevant research and the formulation of research guidelines;.
- the establishment and maintenance of a database of relevant work and undertaking arrangements for coordinating and networking of those active in the field including cognitive scientists, educational researchers, practitioners and policymakers.

A note of relevant publications will be found on the back cover of this Occasional Paper.

ESRC Papers relating to Information Technology and Education:

Available from:
Economic and Social Research Council
160, Great Portland Street
London W1N 6BA
Telephone: 01-637 1499

Microcomputers in Education - a framework for research
(Morley Sage and David J. Smith)
Published by ESRC 1983 ISBN 0 86226 125 2 Price £2

Intelligent knowledge-based Systems - UK Social Science Research Inputs
(Linda A. Murray and John T.E. Richardson)
Published by ESRC 1984 ISBN 0 86226 108 2 Price £2

Information Technology and Education - signposts and research directions
(Editor David J. Smith)
Published by ESRC 1984 ISBN 0 86226 152 X Price £5

Current papers of the ESRC-Information Technology and Education Programme:

Available at no cost from:
ESRC-ITE Programme
Department of Psychology
University of Lancaster
Lancaster LA1 4YF

Telephone: 0524-65201 Ext 4547 (24hr. answering)
JANET: PSG001 @ LANCS.VAX1
TINS: YMA 207

ITE/3/85 Spring Seminars Report, May 1985
ITE/4/85 The ITE Programme, September 1985
ITE/5/85 Electronic Communication and Information, December 1985
ITE/6/86 A Thesaurus for IT and Education, January 1986
ITE/7/86 Guide to the Programme's Electronic Information Services, February 1986